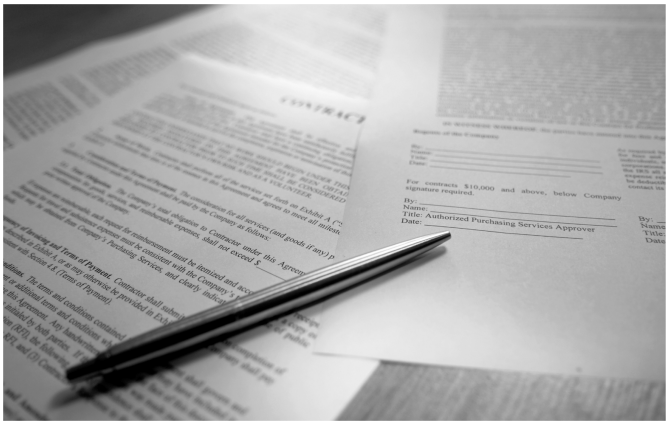

procserve

# Hybrid Community User Manual for the Procserve Commerce Network Release 4.7

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# 1

# About this Guide

# 1 About this Guide

## 1.1 Introduction

The aim of this guide is to give you a comprehensive guide on how to use the Procserve Commerce Network system effectively.

**Who is Procserve?**

Procserve is a Commerce Network. It connects buyers and suppliers together via a fully hosted eCommerce infrastructure. Procserve particularly specialises in providing and managing eProcurement and eInvoicing solutions and services for customers.

**What does Procserve offer?**

- Procserve offers packaged Commerce Solutions to enable our customers of all sizes and technical capabilities to connect to the Commerce Network
- All of our solutions are provided as software-as-a-service, with no requirement for capital investment in IT infrastructure

**What do our solutions consist of?**

The Procserve solutions are a blend of world-class application Commerce Modules, all hosted and managed by Procserve, combined with professional service packages that ensure a swift implementation and maximum return on investment.

**The Procserve Commerce Network**

Procserve offers two types of services, **commerce solutions** and **commerce services**. Regardless of what back office infrastructure organisations have, Procserve implements only those trading solutions needed to complete their ability to conduct electronic transactions between buyer and supplier. Procserve also provides services in order to implement these commerce solutions and exploit their capability. The level of services provided are entirely flexible.

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# 2
# Procserve Commerce Network

# 2 Procserve Commerce Network

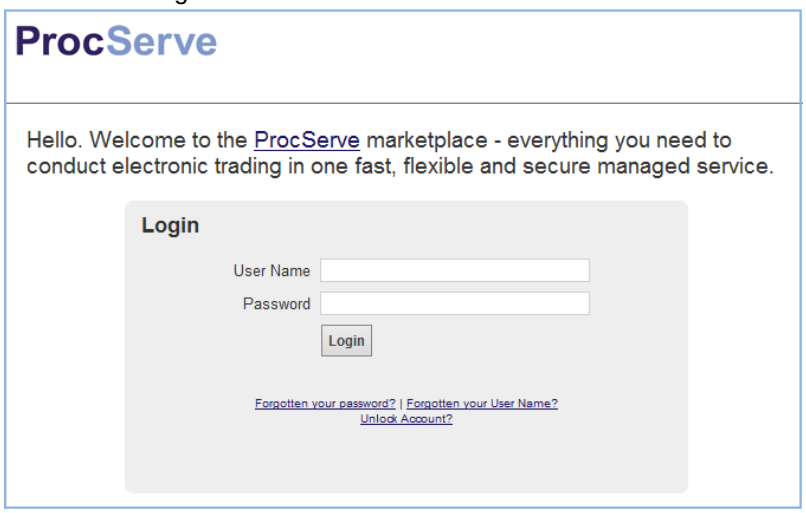
## 2.1 Procserve Commerce Hub Getting Started

### 2.1.1 Logging on to Procserve Commerce Hub

**1. Navigate to the Procserve Commerce Hub URL:**

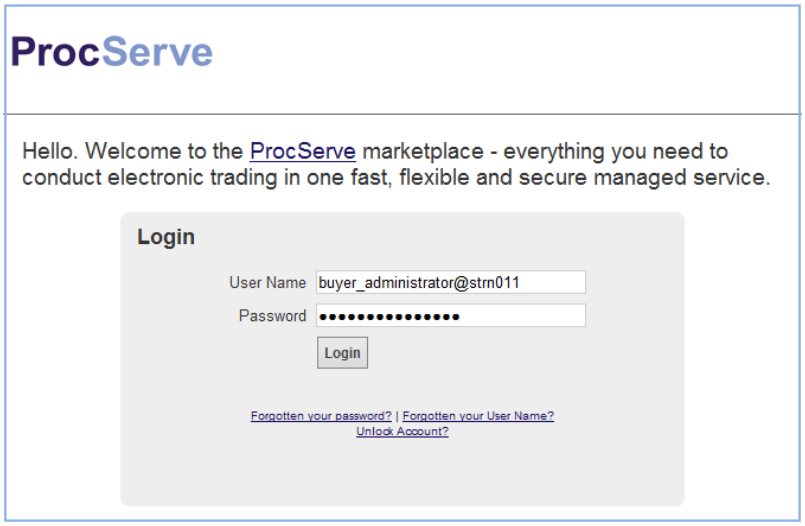
https://buyers.procserveonline.com/otis/login.html?marketplace=procserve

You will be presented with the log in screen:


ProcServe
Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.
Login
User Name
Password
Login
Forgotten your password? | Forgotten your User Name?
Unlock Account?

**2. Enter your username and password:**

**Tip!** You will have received these via email. It is sometimes easier to copy and paste the system generated password.


ProcServe
Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.
Login
User Name buyer_administrator@strn011
Password
Login
Forgotten your password? | Forgotten your User Name?
Unlock Account?

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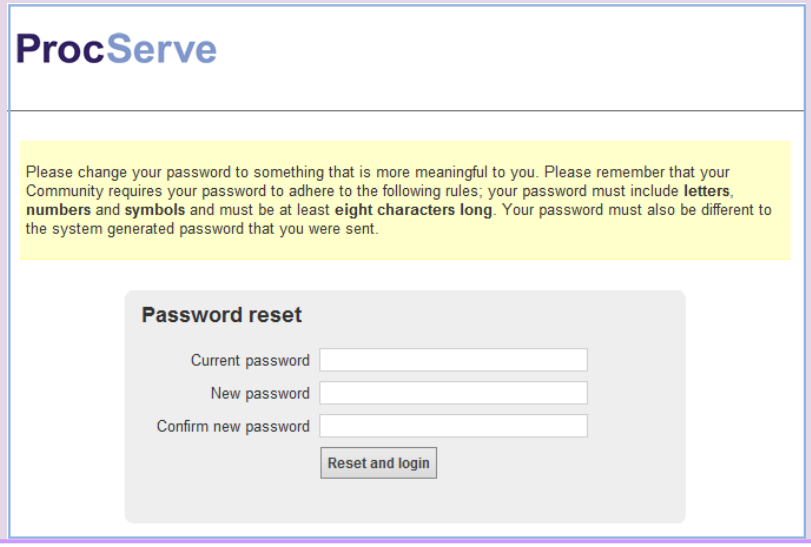
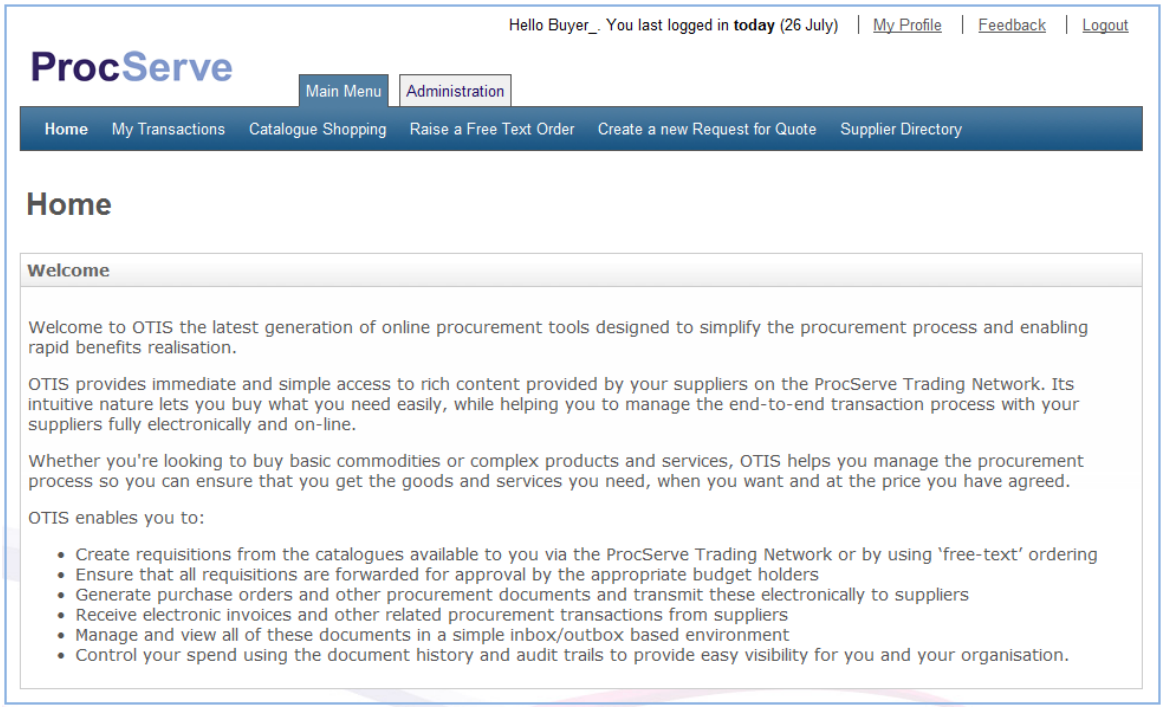
**Tip!** If this is the first time you have logged in - you will be asked to reset your password and create a memorable word. The memorable word is used to reset your account should you lock it through multiple incorrect log in attempts:


ProcServe
Please change your password to something that is more meaningful to you. Please remember that your Community requires your password to adhere to the following rules; your password must include letters, numbers and symbols and must be at least eight characters long. Your password must also be different to the system generated password that you were sent.
Password reset
Current password
New password
Confirm new password
Reset and login

You will see the home page:


Hello Buyer_. You last logged in today (26 July) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using 'free-text' ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers
Receive electronic invoices and other related procurement transactions from suppliers
Manage and view all of these documents in a simple inbox/outbox based environment
Control your spend using the document history and audit trails to provide easy visibility for you and your organisation.

**Note:** The menus that you are presented with will depend on the roles your user has been given.

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## 2.1.2 Retrieving a Lost Password

### Overview

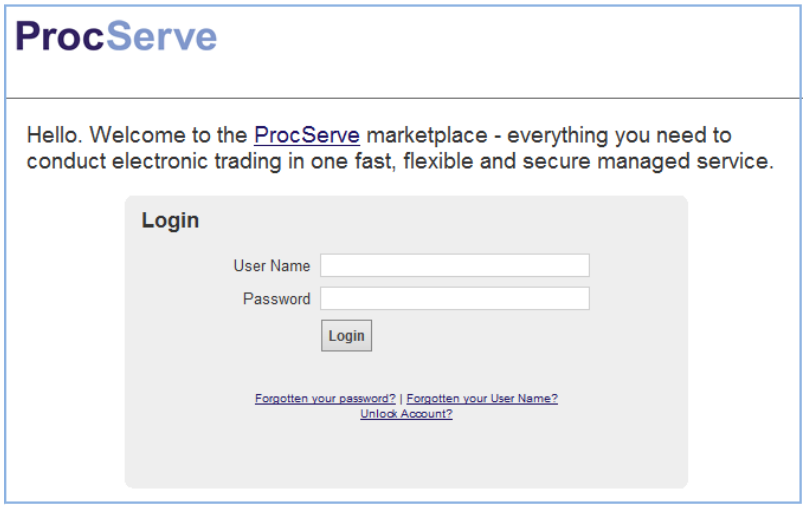
Should you forget your password, you can generate a system password which will be emailed to your registered account.

### Retrieving a lost password

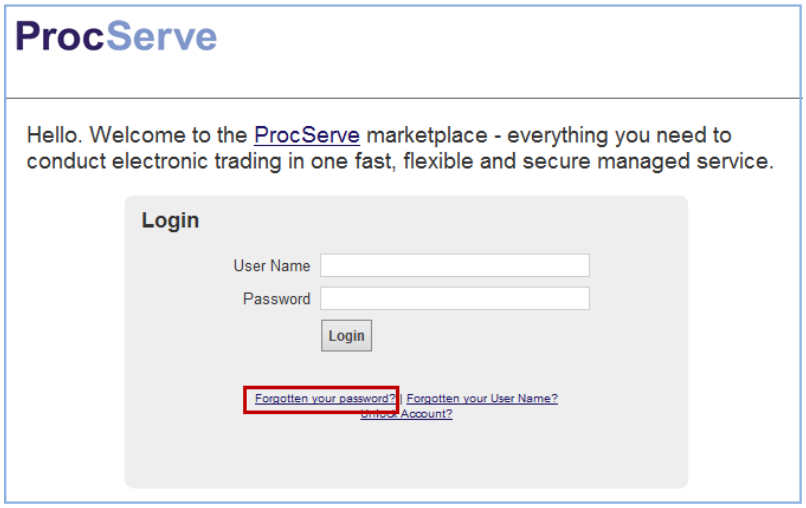
**1. Navigate to the Procserve Commerce Hub URL:**

https://buyers.procserveonline.com/otis/login.html?marketplace=procserve

You will be presented with the log in screen:


ProcServe
Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.
Login
User Name
Password
Login
Forgotten your password? | Forgotten your User Name?
Unlock Account?

**2. Click on the 'Forgotten your password?' link at the bottom of the page:**


ProcServe
Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.
Login
User Name
Password
Login
Forgotten your password? | Forgotten your User Name?
Unlock Account?

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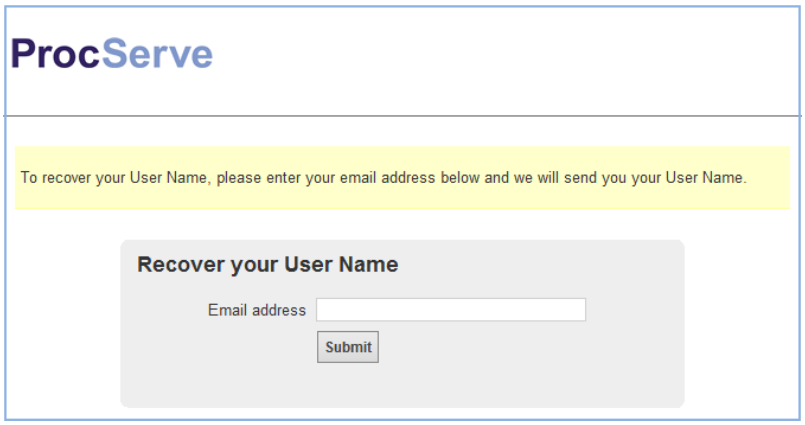
**3. Enter your username:**


ProcServe
To recover your User Name, please enter your email address below and we will send you your User Name.
Recover your User Name
Email address
Submit

**4. Click 'Submit'**

**Note:** Your password will be sent to you via email. The next time you log in you will have to change it from the system generated password.

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## 2.1.3 Retrieving a Lost Username

### Overview

Should you forget your username, you can request a reminder which will be emailed to your registered account.

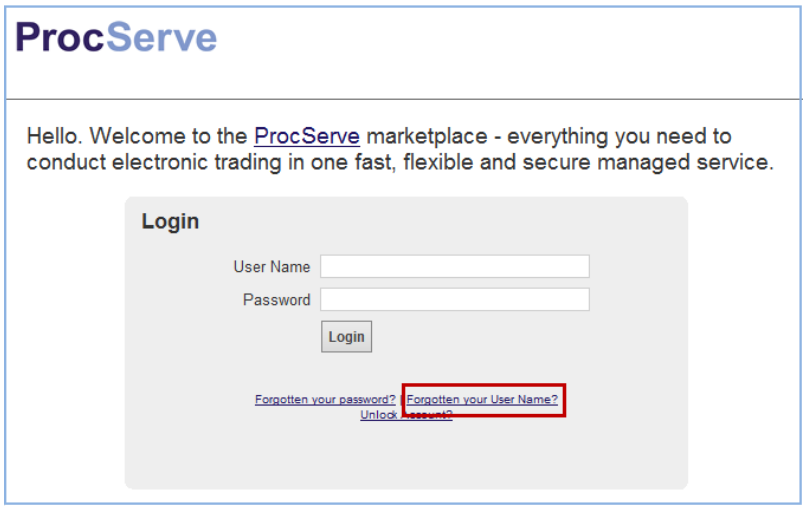
### Retrieving a lost username

**1. Navigate to the Procserve Commerce Hub URL:**

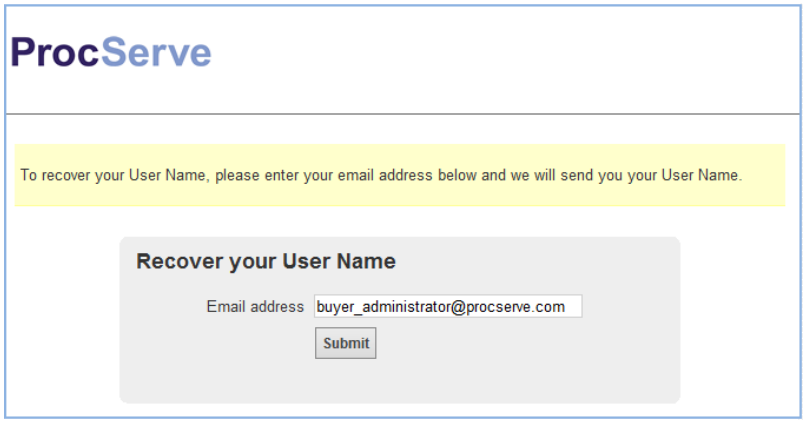
https://buyers.procserveonline.com/otis/login.html?marketplace=procserve

You will be presented with the log in screen, at log in screen:

**2. Click on the 'Forgotten your username?' link:**


ProcServe
Hello. Welcome to the ProcServe marketplace - everything you need to conduct electronic trading in one fast, flexible and secure managed service.
Login
User Name
Password
Login
Forgotten your password?
Forgotten your User Name?
Unlock Account?

**3. Enter your email address:**


ProcServe
To recover your User Name, please enter your email address below and we will send you your User Name.
Recover your User Name
Email address
buyer_administrator@procserve.com
Submit

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**4. Click 'Submit'**

**Note:** Your username will be sent to you via email as an example below:

Hello Buyer_

We received a request for your User Name to be resent to you. Please see below:

Your User Name is: buyer_administrator@strn011

Using this and your Password you can now log in to the eMarketplace at:

https://saturn-buyers.procserveonline.com/otis/login.html?marketplaceId=2&locale=en_GB

The first time you use this password you will be asked to change it to something more memorable for you.

It is recommended that instead of typing the User Name try copying and pasting it into the login screen using the following steps:
1. Highlight the User Name making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'
3. In the User Name field of the login screen right click again and select 'Paste'

If you did not request a User Name reminder, please contact the Zanzibar Service Desk via zanzibarhelpdesk@procserve.com

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## 2.1.4 Navigating Around Procserve Commerce Hub

### Overview

When you first log in to Procserve Commerce Hub you will land on the homepage. Below is a brief description of where you need to navigate to in order to access the various features of Procserve Commerce Hub.

**Note:** The menu options and features that you have will depend on your organisation and the role that you have been given.

### The Hompage

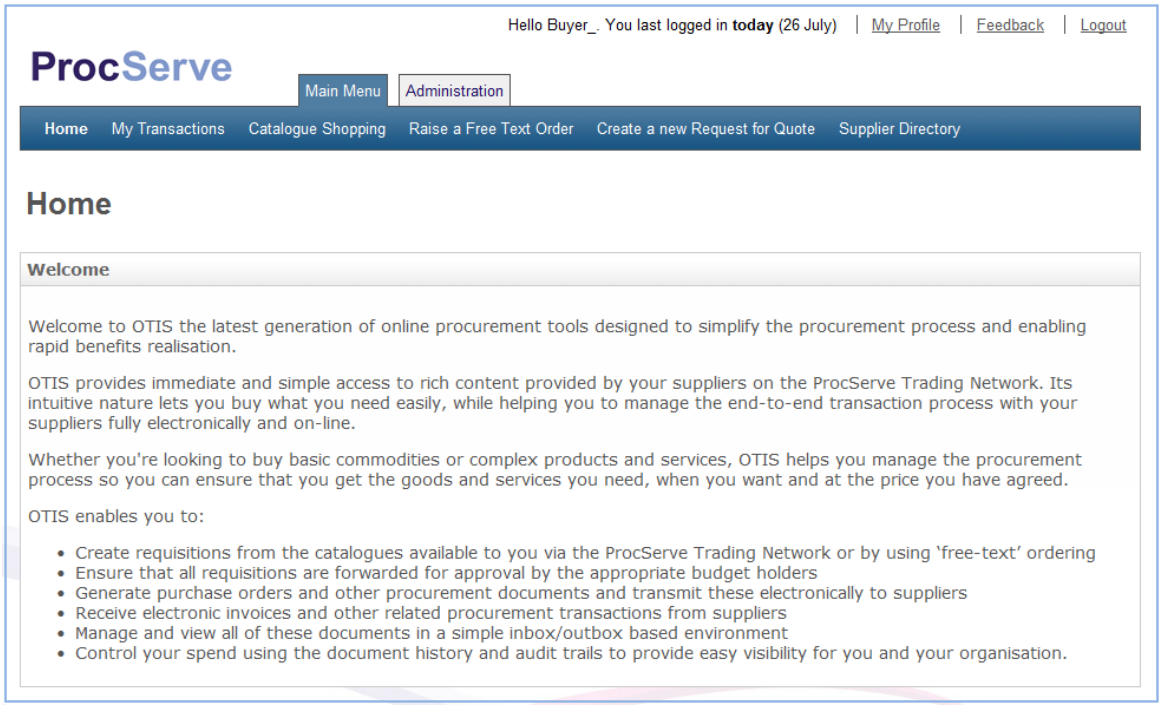
**1] Header** - from here you can change your profile and password, give feedback on Procserve Commerce Hub and log out of Procserve Commerce Hub.

**2] Menu tabs** - the two options are 'Main Menu' and 'Administration'. These are described later in this section.

**3] Menu options** - once selected you can view a variety of other menus which are described later in this section.

**4] Menu body** - the detail of the area where you can complete your required task.

**5] Footer details** - Procserve privacy and accessibility details as well as some useful contact information of the Procserve Commerce Hub administrators.


Hello Buyer_. You last logged in today (26 July) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using 'free-text' ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers
Receive electronic invoices and other related procurement transactions from suppliers
Manage and view all of these documents in a simple inbox/outbox based environment
Control your spend using the document history and audit trails to provide easy visibility for you and your organisation.

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### Main Menu Options

**Note:** Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

**1] Home** - shows the homepage and any news feeds

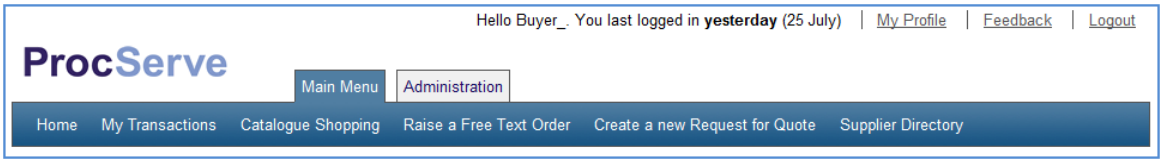
**2] My Transactions** - My Transactions captures your own and your organisations transactions. From within My Transactions you can perform any approvals that may be required on specific document types. You can also view inbound documents and documents you have created.

**3] Catalogue Shopping** - You can access the marketplace and shop for catalogue items.

**4] Create a new Free Text Order** - You can shop for non catalogue items. This tool provides a method to keep all transactions within Procserve Commerce Hub.

**5] Create a new Request for Quote (RFQ)** - You can create a Request for Quote (RFQ) for any good or service where you require a competitive procurement process to take place.

**6] Supplier Directory** - Supplier Directory allows you to view all suppliers registered on the Procserve Trading Network who are available in your marketplace.




### Administration Menu Options

**Note:** Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

**1] Community Management** - Within Community Management you can edit the helpdesk contact details, organisations and catalogue content and views.

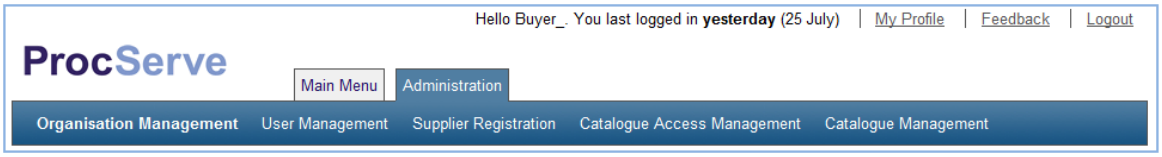
**2] Organisation Management** - You can view and edit the the general address details of your organisation in 'Organisation Management'.

**3] User Management** - You can add, edit and deactivate users within your organisation in 'User Management'

**4] Supplier Registration** - You can manage your supplier adoption in 'Supplier Registration'

**5] Catalogue Access Management** - You can determine which organisations and users can see what content in 'Catalogue Access Management'

**6] Catalogue Management** - You can upload and manage your catalogue content in 'Catalogue Management'

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## 2.1.5 My Profile

### Overview

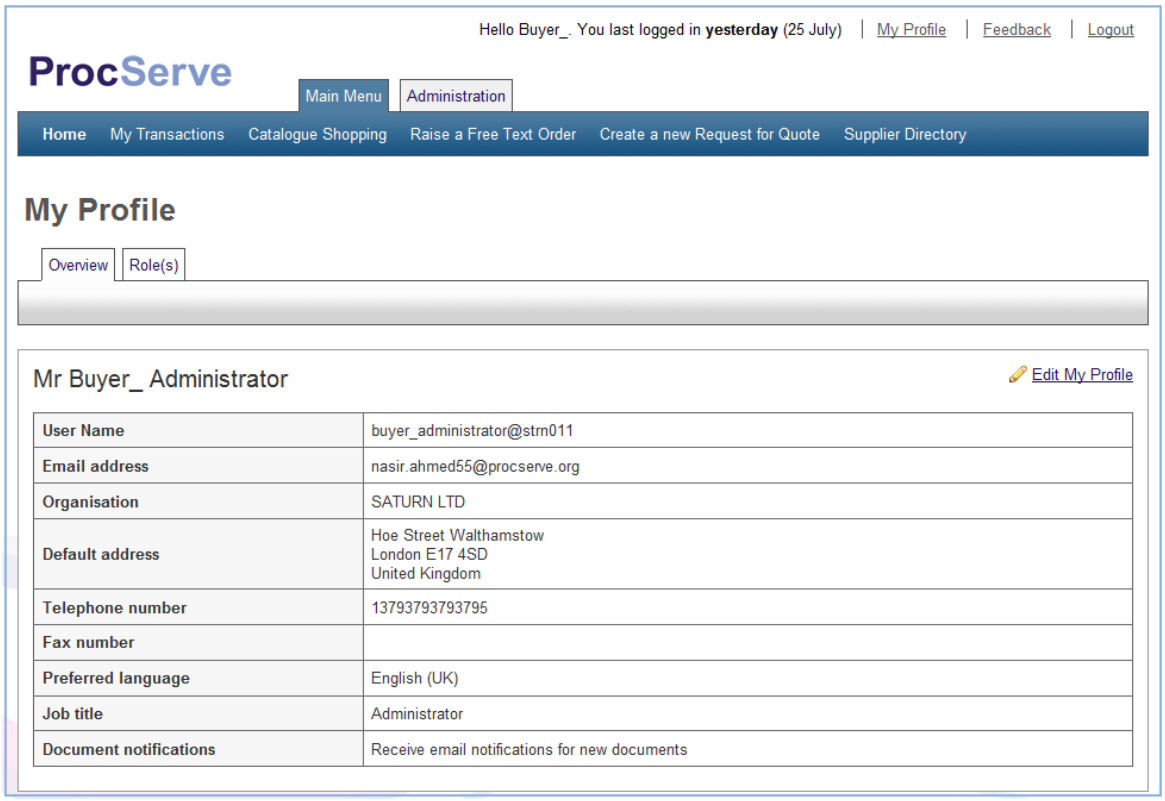
Within the My Profile you can edit your general details and view the roles that you have.

Note: Dependant on the roles you have been given you may not be able to see all functions in the below screenshots.

### Viewing My Profile

**1. Click on 'My Profile' from any page within Procserve Commerce Hub**

You will be taken to the overview page where you can view and edit your basic details.




You can view any of the tabs and the details within them by clicking on the tab. By clicking on the 'Roles' tab you can view the roles that you have been given.

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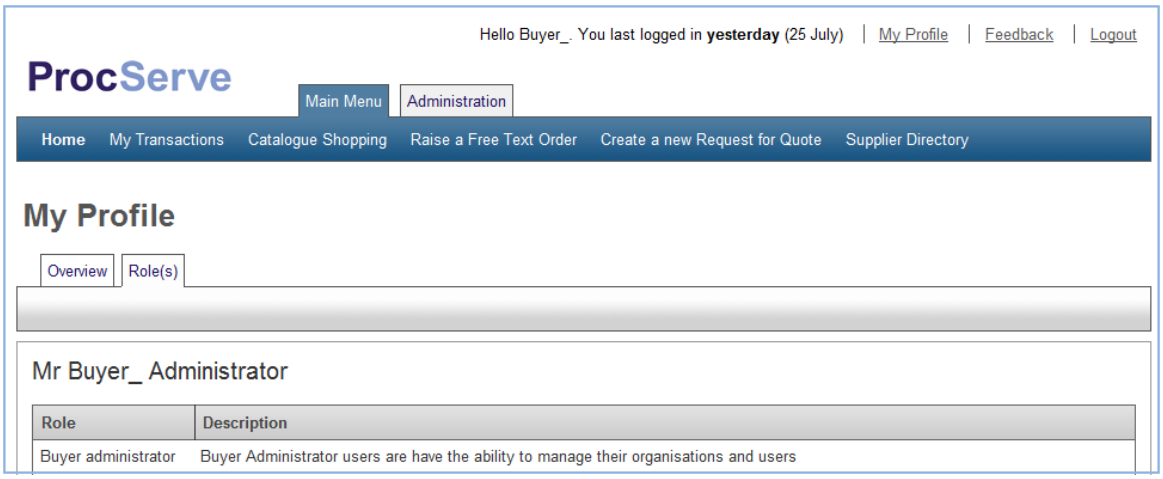


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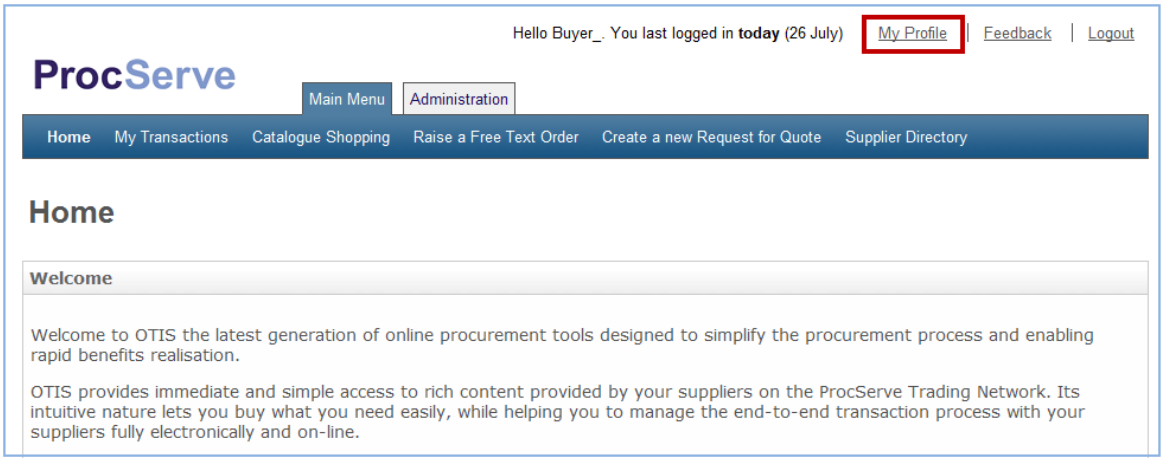
## 2.1.5.1 Editing My Profile

### Overview

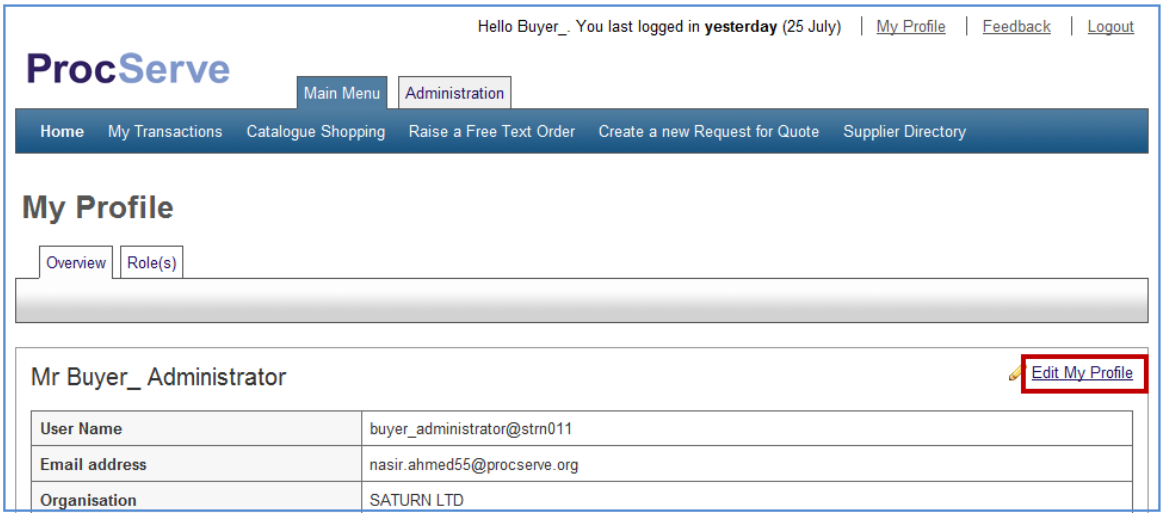
You can update your basic details on your profile.

### Editing my profile

### 1. Click on 'My Profile' from any page within Procserve Commerce Hub


Hello Buyer_. You last logged in today (26 July)
My Profile
Feedback
Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.

### 2. Click on 'Edit My Profile'

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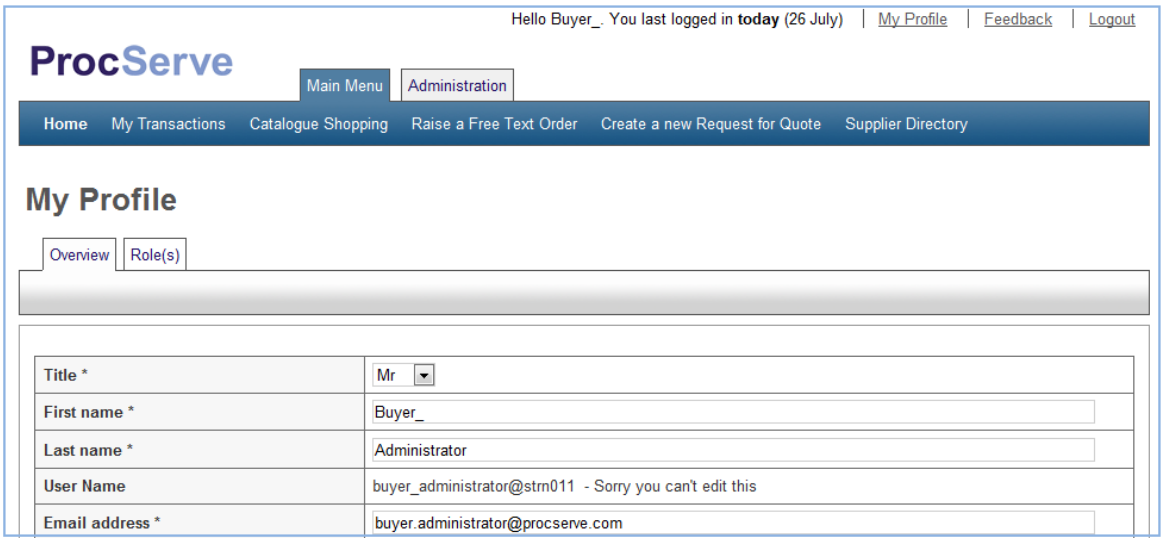
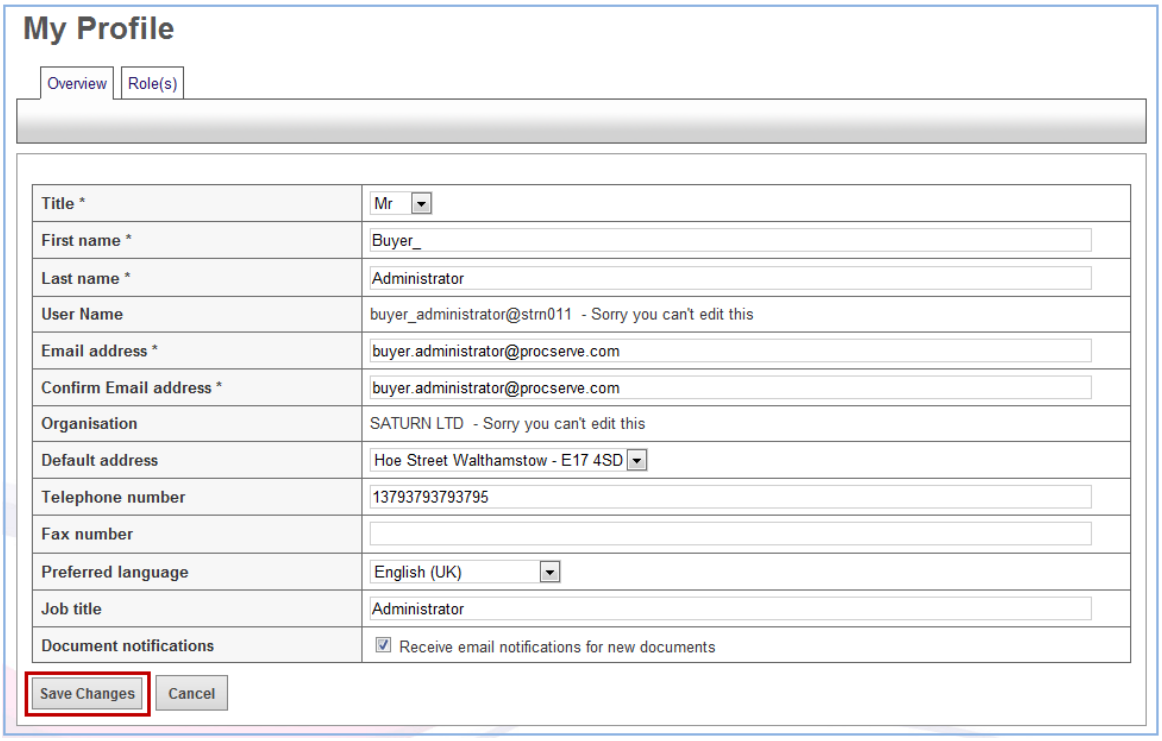
### 3. Edit the features you wish to change




### 4. Once complete, click 'Save Changes'




**Note:** If you wish to cancel your changes, click 'Cancel'

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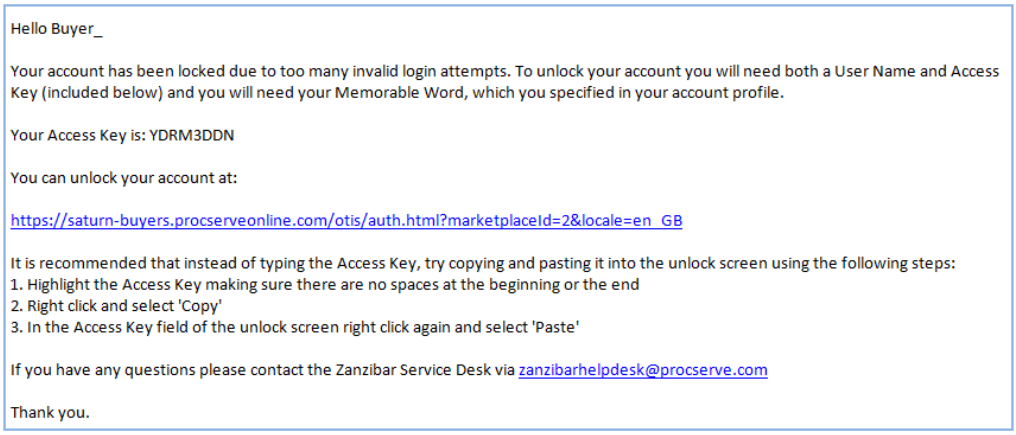
## 2.1.6 Unlocking your Account

### Overview

Your account will be locked if you enter your log in details incorrectly 3 or more times. You will be informed that your account has been locked via an email. You can unlock your own account using your memorable word and the access code contained in the email.

### Unlocking your account

**1. You will receive an email informing you your account has been locked. Within the email are the details you require to unlock your account:**



Hello Buyer_

Your account has been locked due to too many invalid login attempts. To unlock your account you will need both a User Name and Access Key (included below) and you will need your Memorable Word, which you specified in your account profile.

Your Access Key is: YDRM3DDN

You can unlock your account at:

https://saturn-buyers.procserveonline.com/otis/auth.html?marketplaceId=2&locale=en_GB

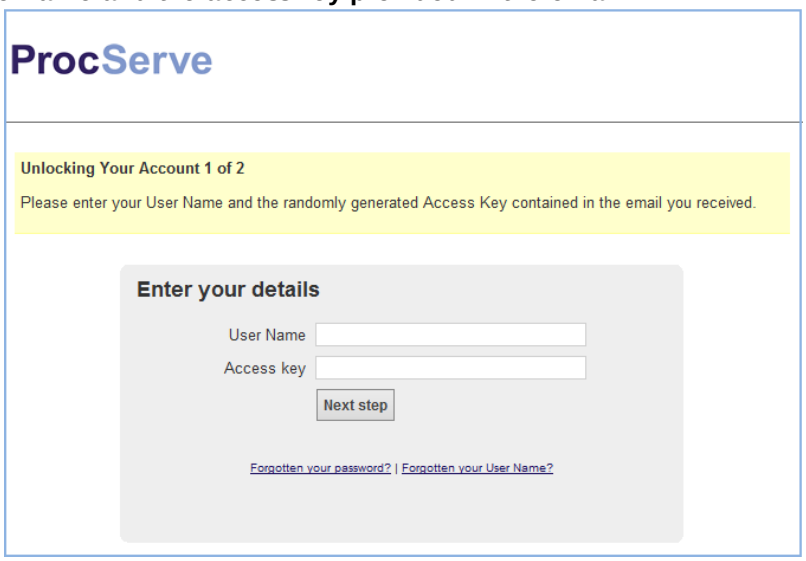
It is recommended that instead of typing the Access Key, try copying and pasting it into the unlock screen using the following steps:
1. Highlight the Access Key making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'
3. In the Access Key field of the unlock screen right click again and select 'Paste'

If you have any questions please contact the Zanzibar Service Desk via zanzibarhelpdesk@procserve.com

Thank you.

**2. Navigate to the url within the email or use the 'Unlock account?' on the login page:**

**3. Enter your username and the access key provided in the email:**


ProcServe
Unlocking Your Account 1 of 2
Please enter your User Name and the randomly generated Access Key contained in the email you received.
Enter your details
User Name
Access key
Next step
Forgotten your password? | Forgotten your User Name?

**4. Enter the memorable word. You hint will be displayed in the instructions window:**

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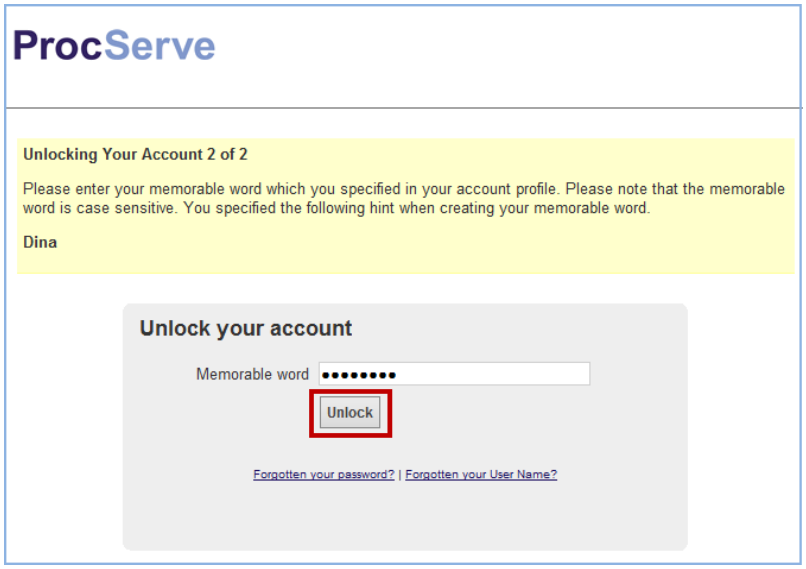
ProcServe
Unlocking Your Account 2 of 2
Please enter your memorable word which you specified in your account profile. Please note that the memorable word is case sensitive. You specified the following hint when creating your memorable word.
Dina
Unlock your account
Memorable word
Unlock
Forgotten your password? | Forgotten your User Name?

**5. Your account is unlocked. If you do not remember your password you can request a new one which will be emailed to you.**

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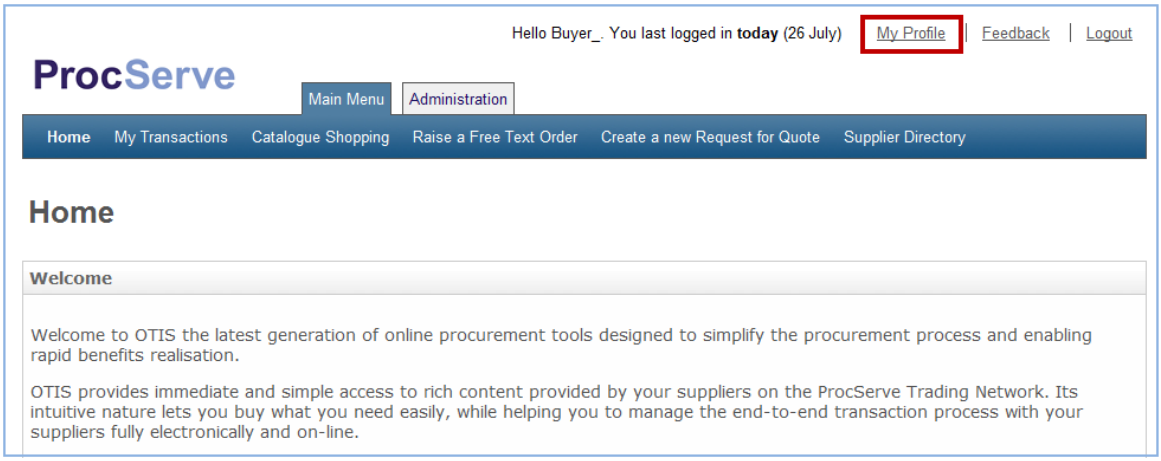
## 2.1.7 Changing My Password

### Overview

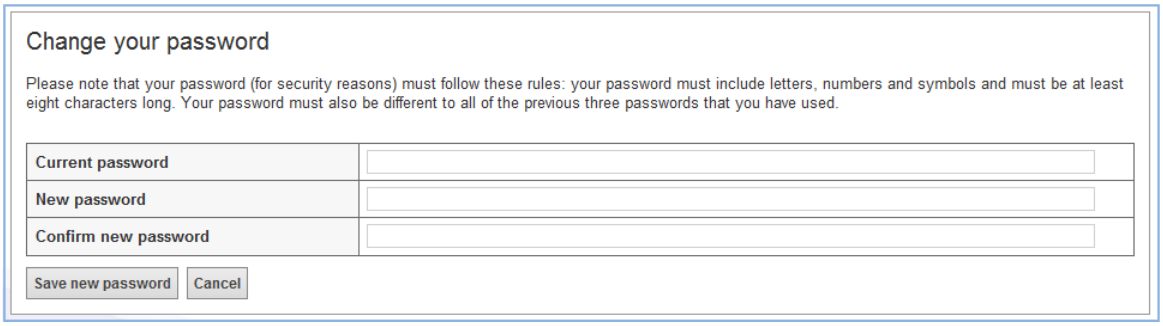
You can change your password at any time within 'My Profile'

### Changing my password

**1. Click on 'My Profile' from any page within Procserve Commerce Hub**


Hello Buyer_. You last logged in today (26 July)
My Profile
Feedback
Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.

**2. On the overview screen, scroll down to the 'Change your password' area**


Change your password
Please note that your password (for security reasons) must follow these rules: your password must include letters, numbers and symbols and must be at least eight characters long. Your password must also be different to all of the previous three passwords that you have used.
Current password
New password
Confirm new password
Save new password
Cancel

**3. Enter your old password and what you wish to change it to.**

**Note:** Be aware of the password restrictions within your marketplace that are narrated above the password change fields

**4. Click 'Save new password' to save the changes**

**Note:** You can cancel the changes by clicking the 'Cancel' button.

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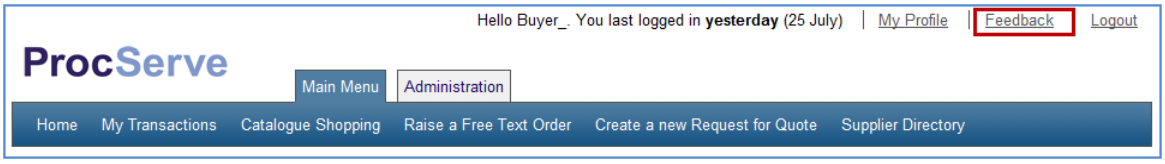
## 2.1.8 Giving Feedback on Procserve Commerce Hub

### Overview

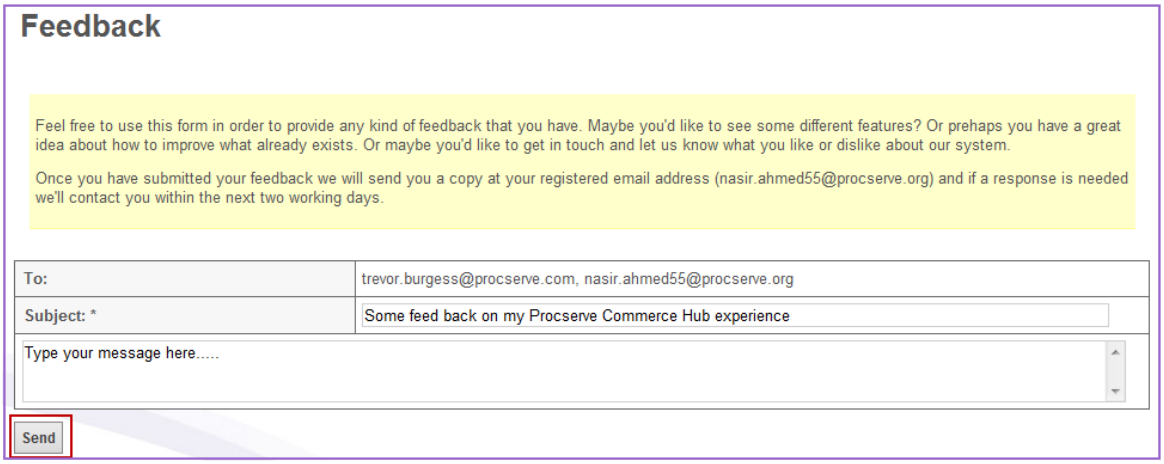
You can use the feedback section to provide Procserve with feedback on the system.

### Providing feedback

**1.From any screen within Procserve Commerce Hub click 'Feedback':**

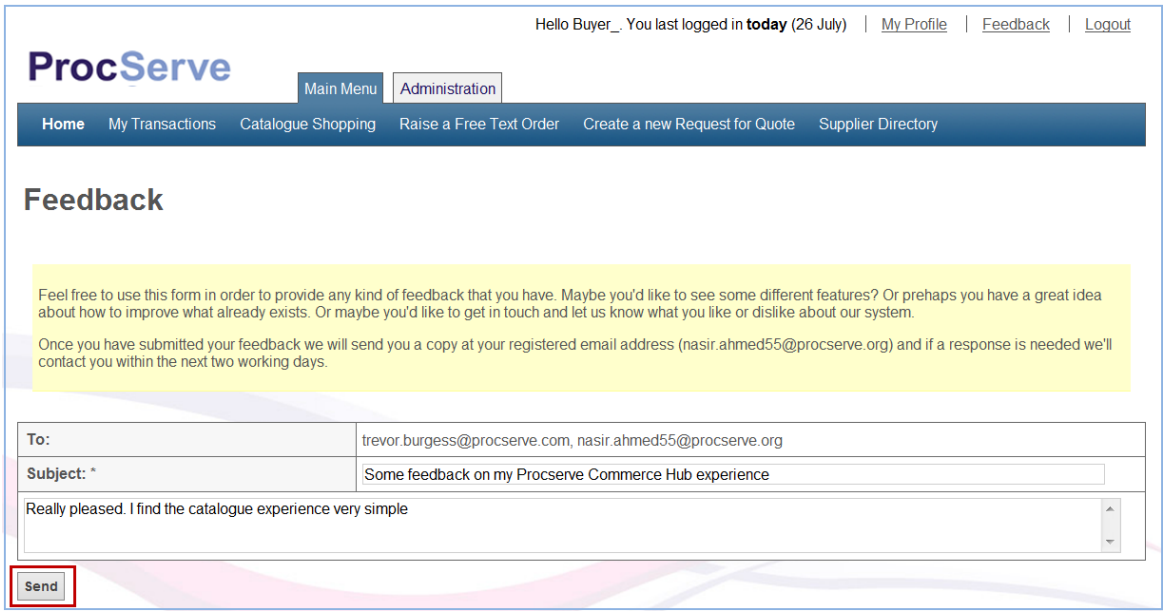



**2. Enter your feedback notes and subject in the box provided:**


Feedback
Feel free to use this form in order to provide any kind of feedback that you have. Maybe you'd like to see some different features? Or prehaps you have a great idea about how to improve what already exists. Or maybe you'd like to get in touch and let us know what you like or dislike about our system.
Once you have submitted your feedback we will send you a copy at your registered email address (nasir.ahmed55@procserve.org) and if a response is needed we'll contact you within the next two working days.
To:
trevor.burgess@procserve.com, nasir.ahmed55@procserve.org
Subject: *
Some feed back on my Procserve Commerce Hub experience
Type your message here.....
Send

**3. Click 'Send'**

Your message has now been sent to the system administrators.


Hello Buyer_. You last logged in today (26 July)
My Profile
Feedback
Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Feedback
Feel free to use this form in order to provide any kind of feedback that you have. Maybe you'd like to see some different features? Or prehaps you have a great idea about how to improve what already exists. Or maybe you'd like to get in touch and let us know what you like or dislike about our system.
Once you have submitted your feedback we will send you a copy at your registered email address (nasir.ahmed55@procserve.org) and if a response is needed we'll contact you within the next two working days.
To:
trevor.burgess@procserve.com, nasir.ahmed55@procserve.org
Subject: *
Some feedback on my Procserve Commerce Hub experience
Really pleased. I find the catalogue experience very simple
Send

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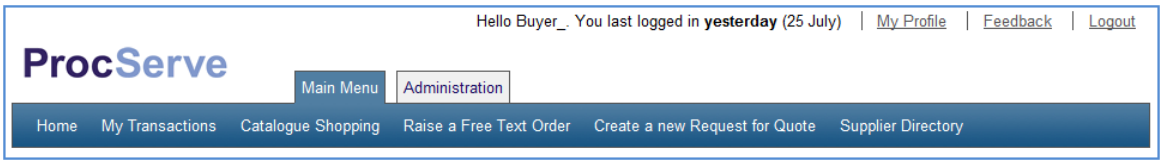
# 2.2 Procserve Commerce Hub Main Menu

## 2.2.1 Overview

**Main Menu Options**

**Note:** Dependent on your organisation set up and roles you have been given, you may not have access to some of the menu options.




**1] Home** - shows the homepage and any news feeds

**2] My Transactions** - My Transactions captures your own and your organisations transactions. From within My Transactions you can perform any approvals that may be required on specific document types. You can also view inbound documents and documents you have created.

**3] Catalogue Shopping** - You can access the marketplace and shop for catalogue items.

**4] Create a new Free Text Order** - You can shop for non catalogue items. This tool provides a method to keep all transactions within Procserve Commerce Hub.

**5] Create a new Request for Quote (RFQ)** - You can create a Request for Quote (RFQ) for any good or service where you require a competitive procurement process to take place.

**6] Supplier Directory** - Supplier Directory allows you to view all suppliers registered on the Procserve Trading Network who are available in your marketplace.

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## 2.2.2 Creating a Request for Quote

### 2.2.2.1 Introduction to RFQ

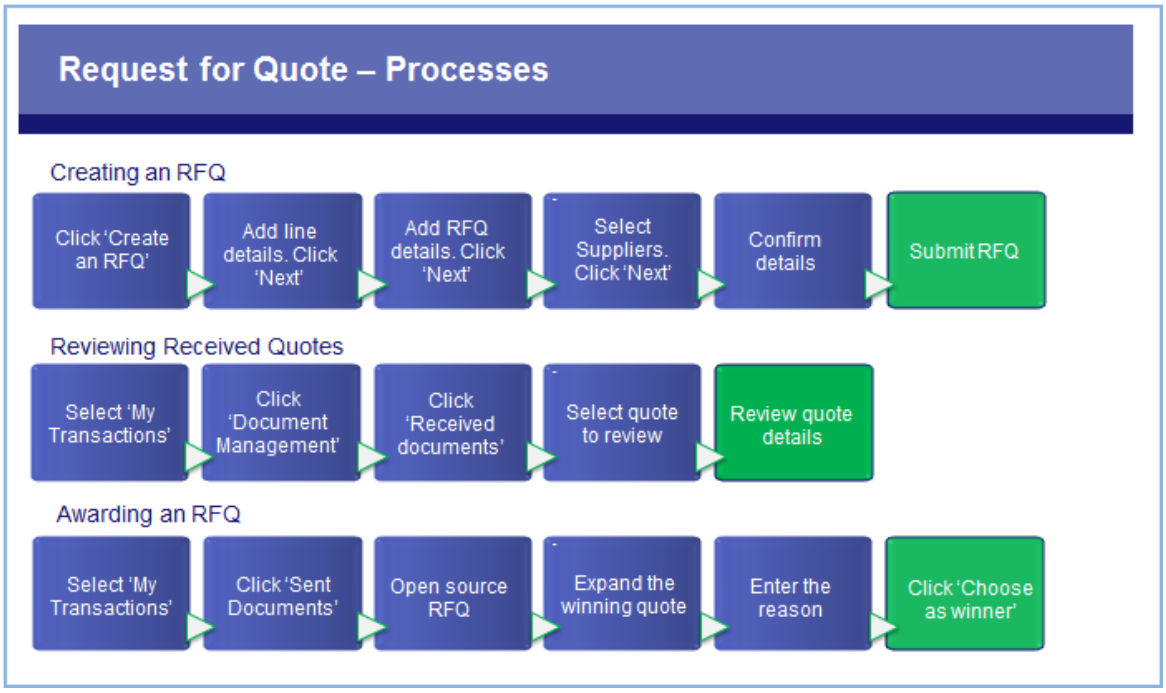
**Overview**

You can use OTIS to send Request For Quotes (RFQ's) to suppliers that are members of your trading community or marketplace. In addition, OTIS allows all responding Quotes from these suppliers to be linked to the originating RFQ for audit trail purposes.

Responding Quotes that are selected as wining bids are automatically converted to Purchase Orders so no re-keying of data is required.

**Note:** You may not be able to complete an RFQ if you do not have the required roles.

**Note:** You should always consider your organisations procurement rules before undertaking an RFQ.

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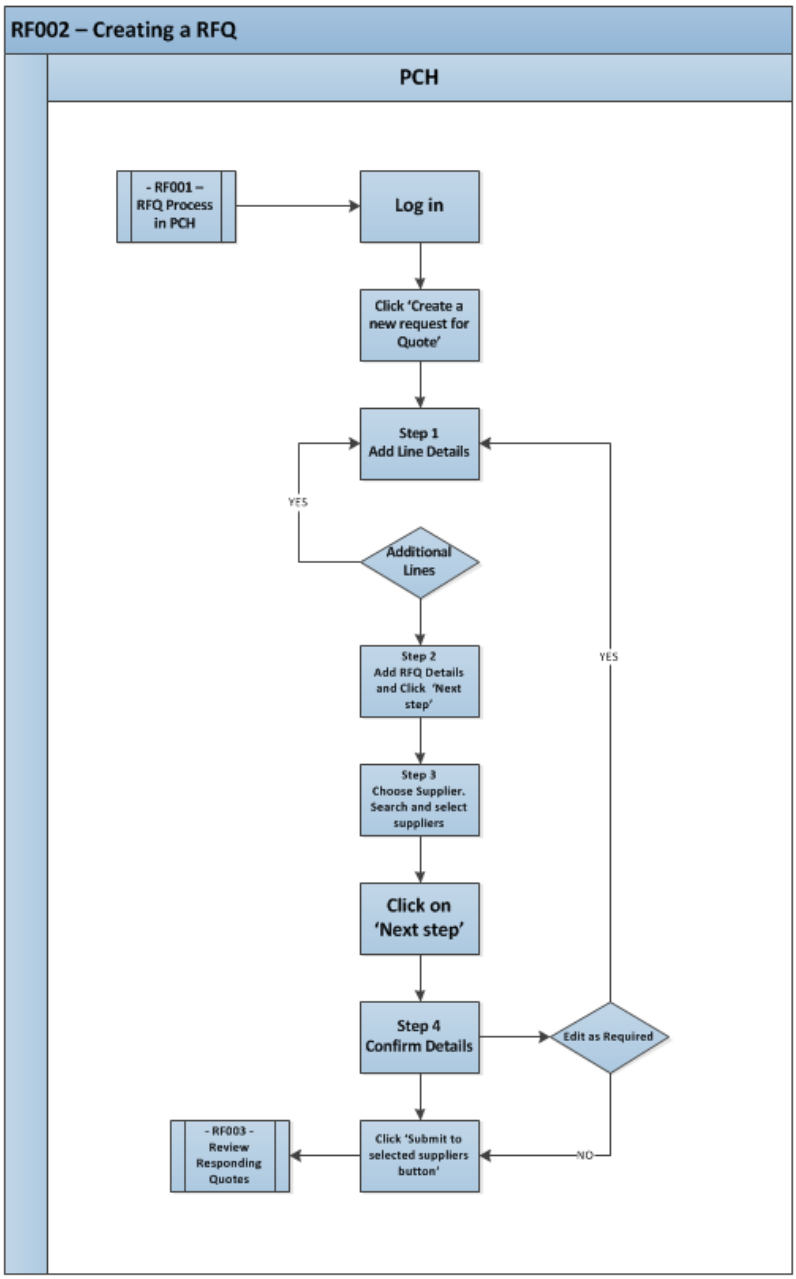
## 2.2.2.2 Raising a Request for Quote

### Overview

This section shows how you can create a Request for Quote.


RF002 – Creating a RFQ
PCH
- RF001 – RFQ Process in PCH
Log in
Click 'Create a new request for Quote'
Step 1 Add Line Details
YES
Additional Lines
Step 2 Add RFQ Details and Click 'Next step'
YES
Step 3 Choose Supplier. Search and select suppliers
Click on 'Next step'
Step 4 Confirm Details
Edit as Required
- RF003 - Review Responding Quotes
Click 'Submit to selected suppliers button'
NO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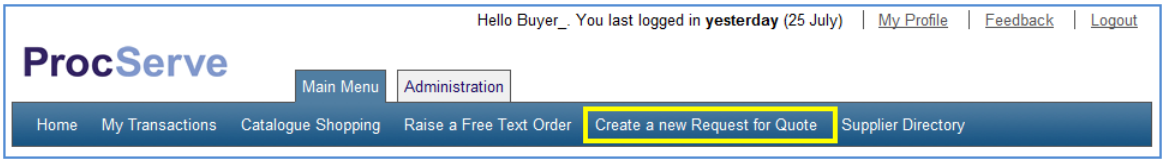
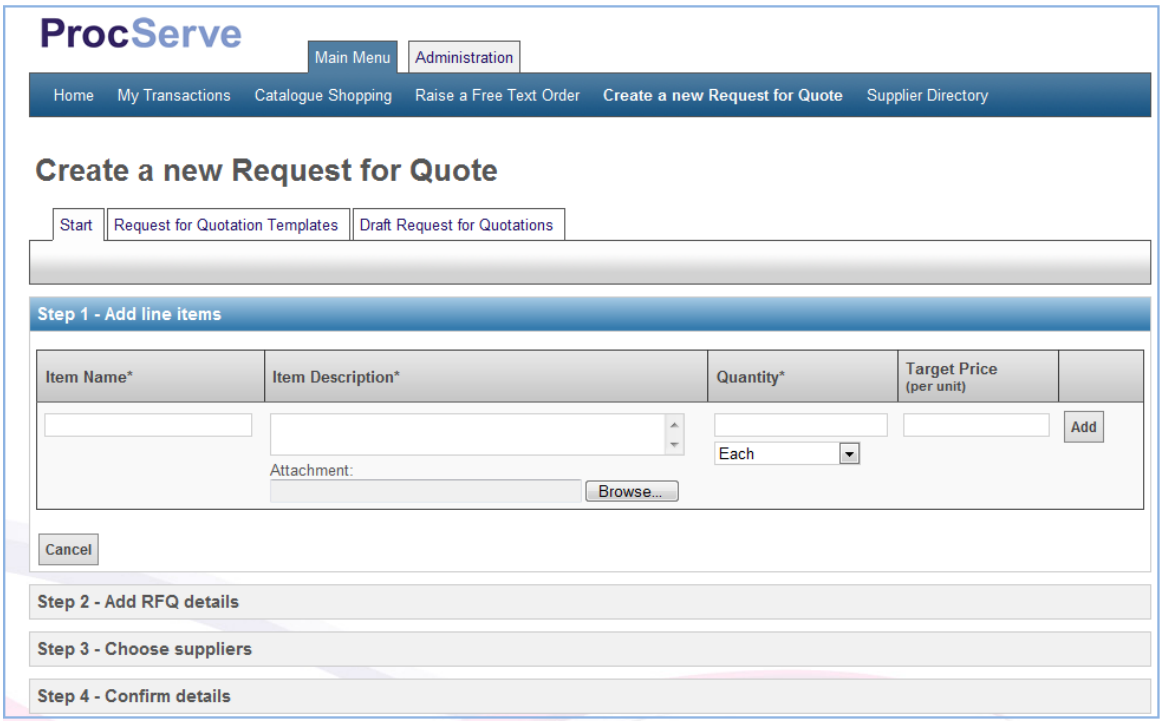
## Creating an RFQ

**1. Log in to Procserve Commerce Hub.**

**2. Click 'Create a new Request for Quote'**




**3. Add in the item details for the first line of your RFQ**




**Tip!** Depending on what you are buying it can be good practice to put in a target price. For example, if you are buying some playground equipment - by putting in a target price you are informing the supplier about your budget and therefore to what scale there offer should be.

**4. Click 'Add'**

**Note:** You can add in multiple lines to complete your RFQ.

**5. When complete click 'Next Step'**

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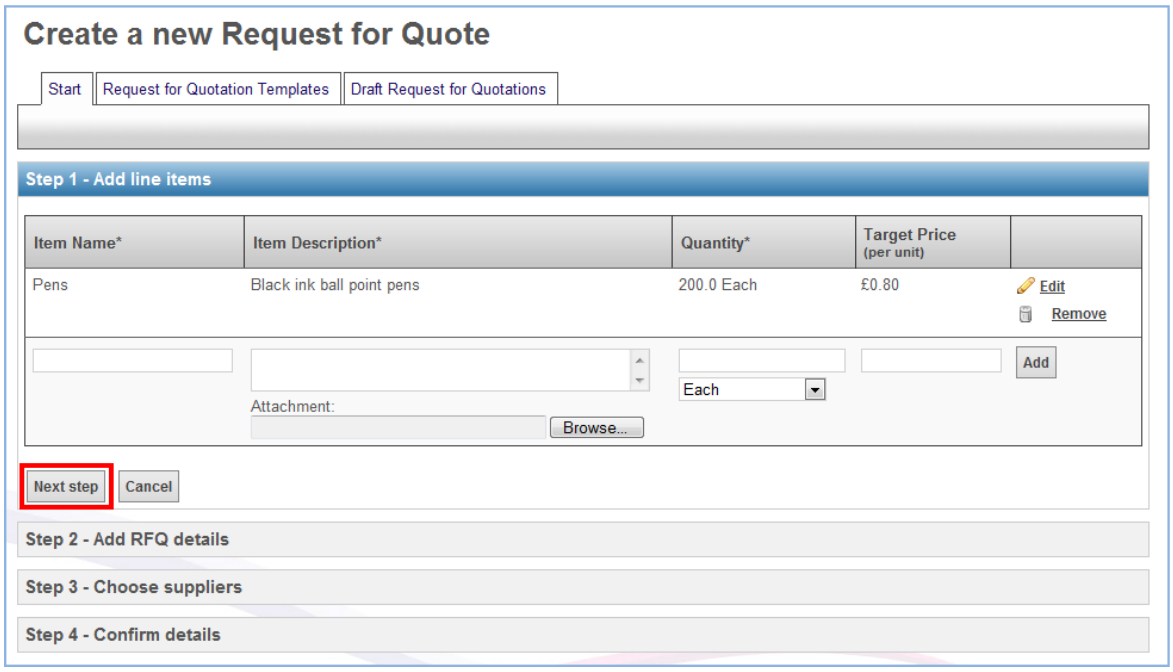
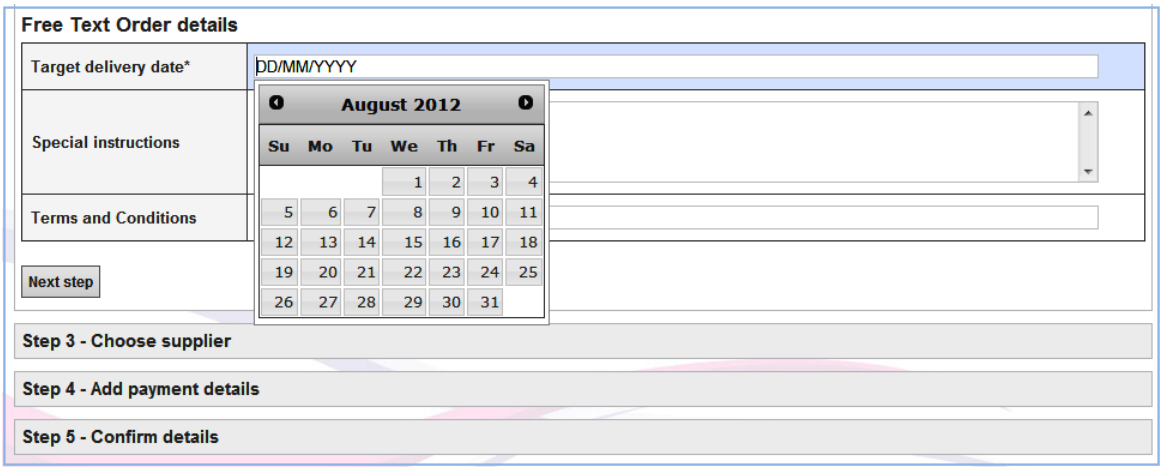



**6. Add the details of the RFQ such as the expiry and delivery requirements**




**Note:** Select a date from when this should expire field to define when the RFQ expires. This date will be shown within the RFQ sent to the supplier.

**Tip!** Adding a reminder in an RFQ sends you a reminder via email that the RFQ is coming to an end. You can define how many days before the RFQ closes you would like to receive this email from the drop down.

**7. When satisfied with the terms of the RFQ, click 'Next Step'**

**8. You then need to search and select some suppliers to submit the RFQ too. You can select search for a supplier using the 'Find available suppliers' search engine:**

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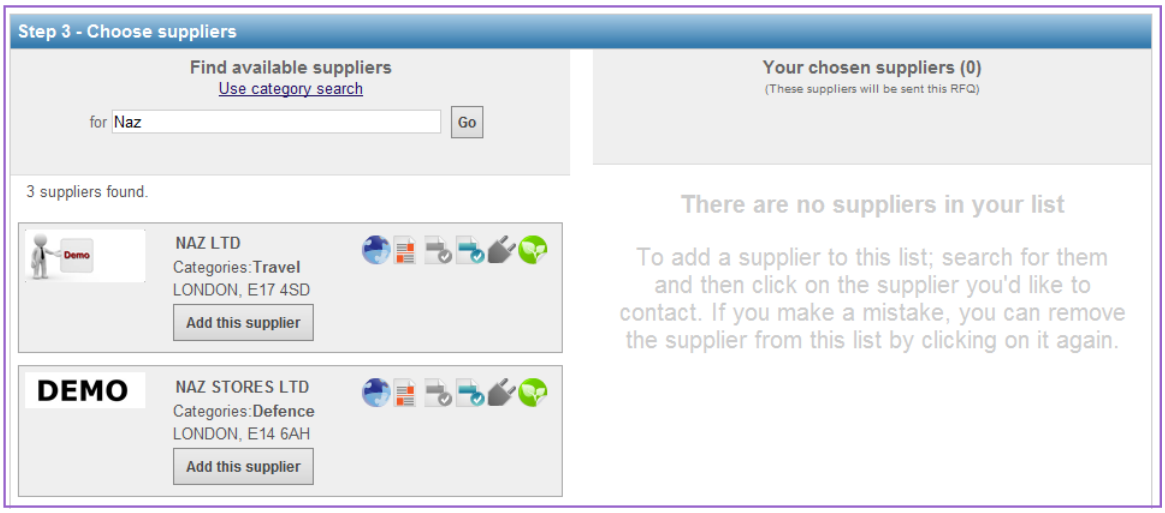
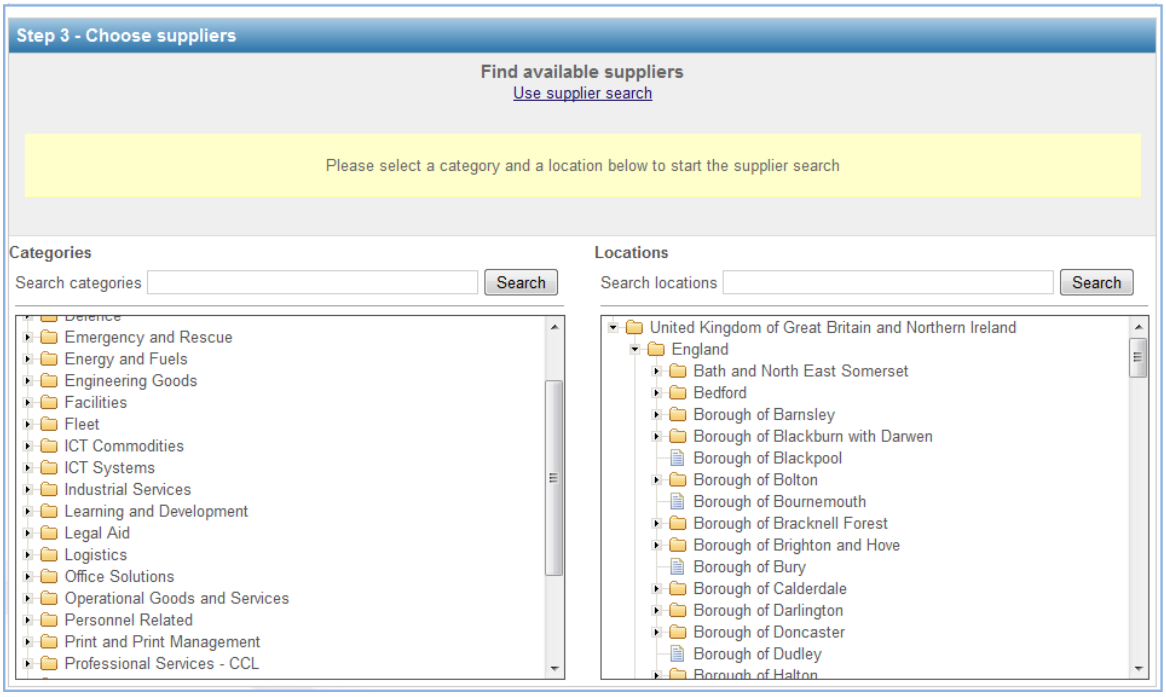

Step 3 - Choose suppliers
Find available suppliers
Use category search
for Naz
Go
3 suppliers found.
NAZ LTD
Categories:Travel
LONDON, E17 4SD
Add this supplier
DEMO
NAZ STORES LTD
Categories:Defence
LONDON, E14 6AH
Add this supplier
Your chosen suppliers (0)
(These suppliers will be sent this RFQ)
There are no suppliers in your list
To add a supplier to this list; search for them and then click on the supplier you'd like to contact. If you make a mistake, you can remove the supplier from this list by clicking on it again.

**9. Or you can use the category search to identify suppliers who provide the commodity you are interested in from the regions you require:**

**10.From within here you can search for categories and locations or drill through the hierarchy until you reach the desired commodity / location:**




**11. Once you have found suppliers that meet the your requirements click 'Add all'**

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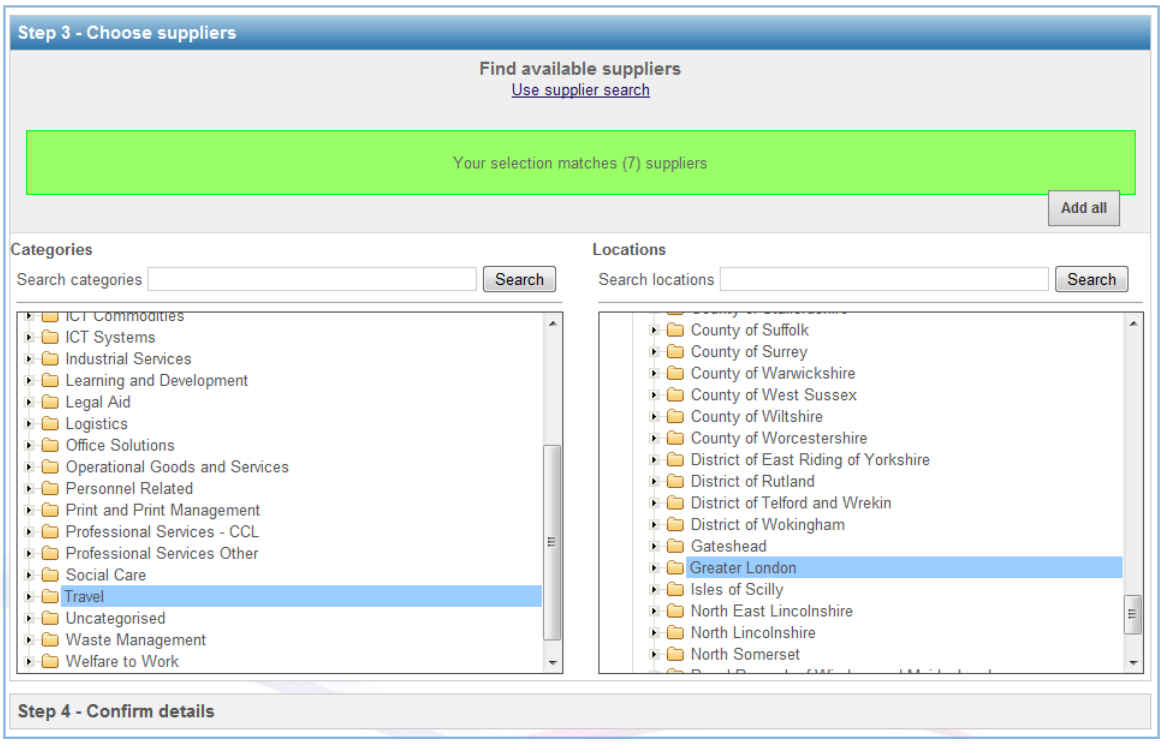
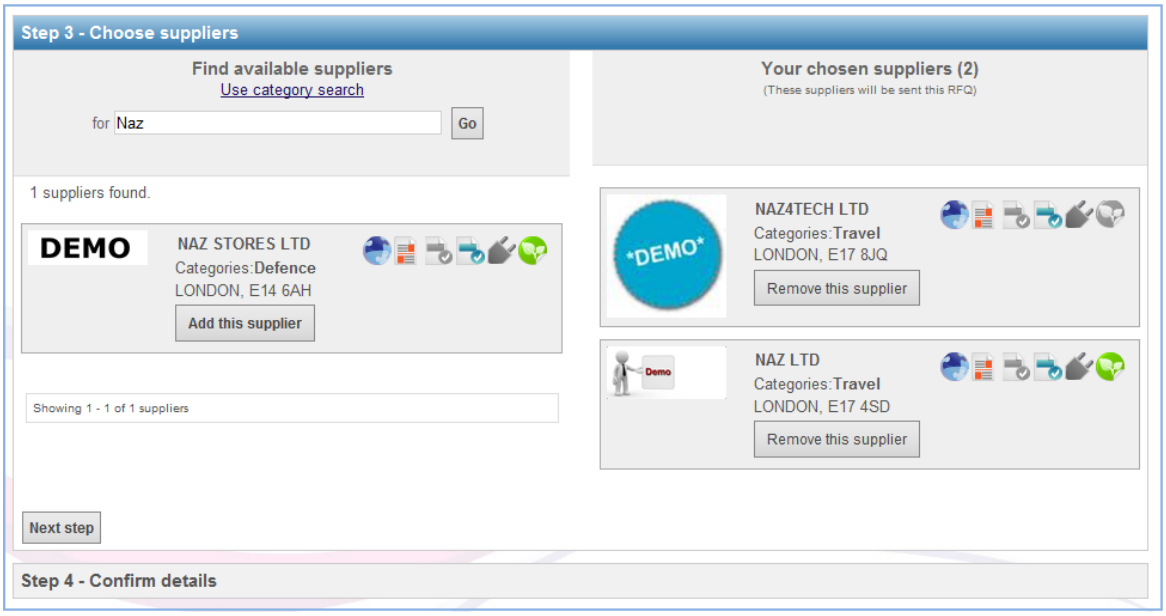
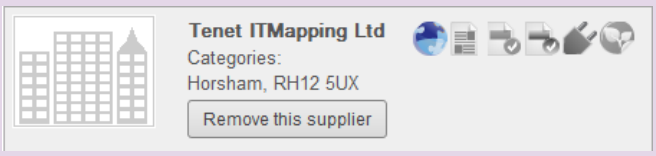



You should be then presented with the suppliers that you have selected in your chosen suppliers list:




**Tip!** You can remove a supplier from the targeted suppliers list by clicking 'Remove this supplier'




**12. Click 'Next step' at the bottom of the page once you have all the suppliers you require to**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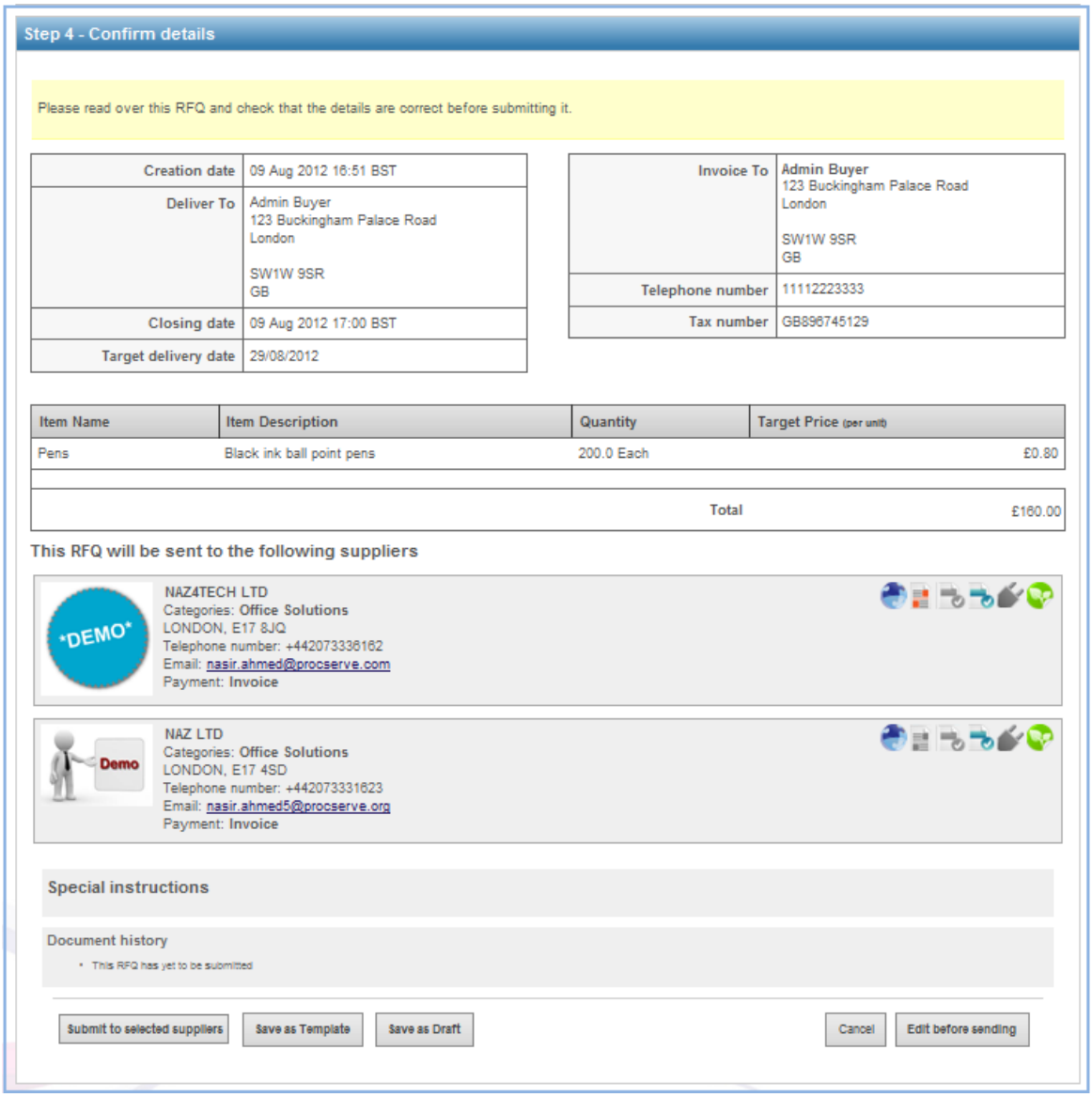
**target with your RFQ.**

**13. You can then confirm the details of the RFQ, edit the content as required, and submit to the suppliers selected.**

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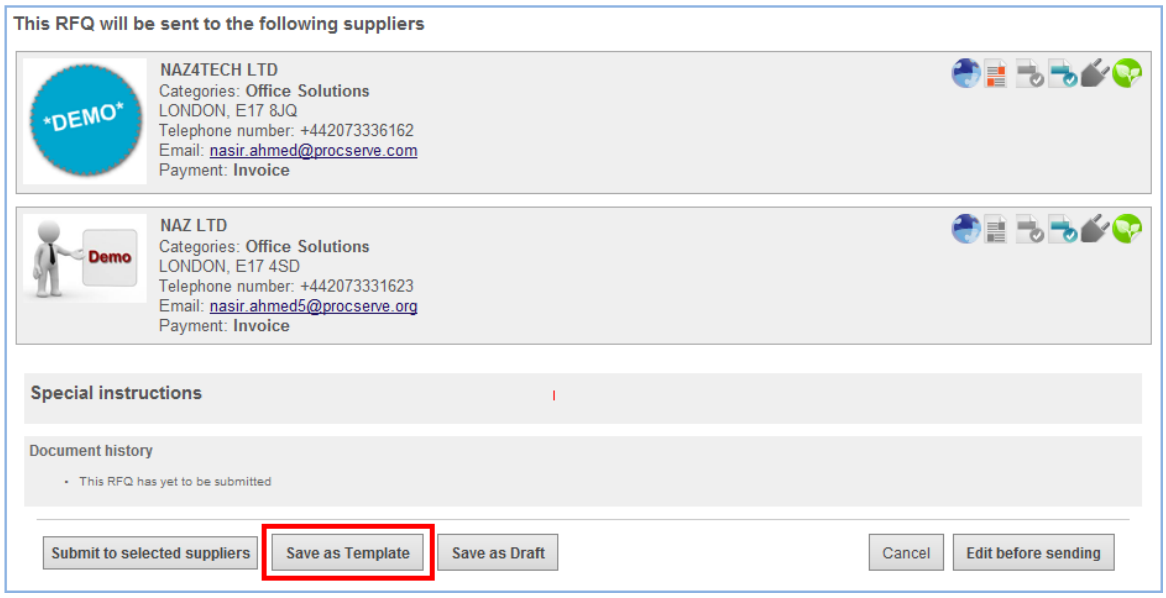
2.2.2.2.1 RFQ Templates

**Overview**

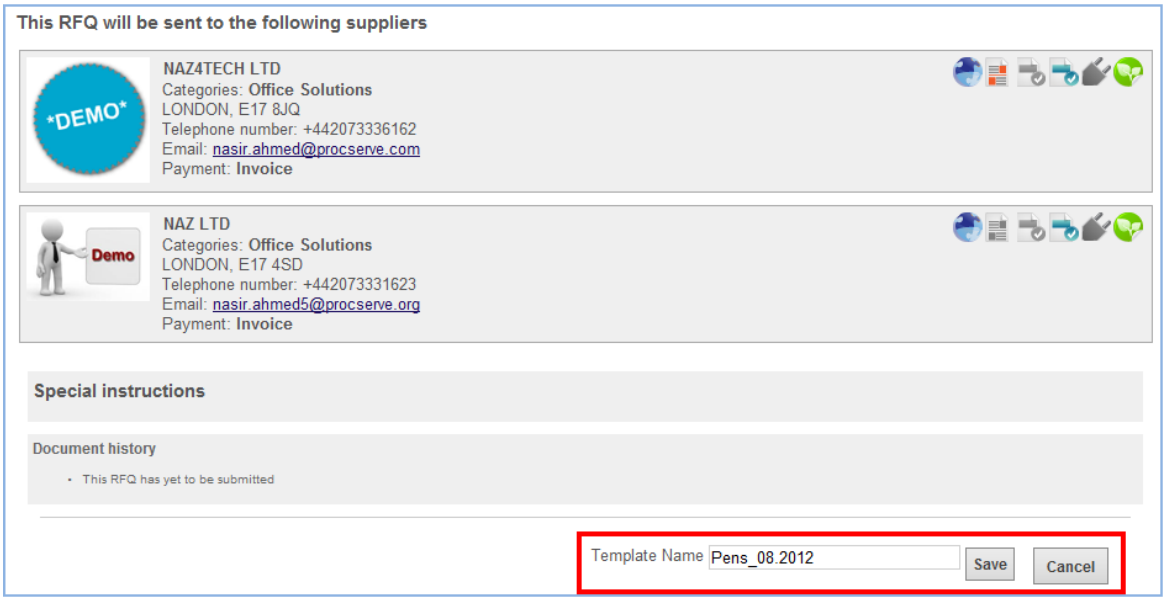
This sections shows how you can save your RFQ as template.

1. Create a new RFQ and go through all the step.

2 At Step 5, before you submit your RFQ to suppliers, click on 'Save as Template'




3. Scroll down to the bottom of the page and enter a suitable name for the RFQ template.




4. Enter a suitable name and click on 'Save' button to save your RFQ template.

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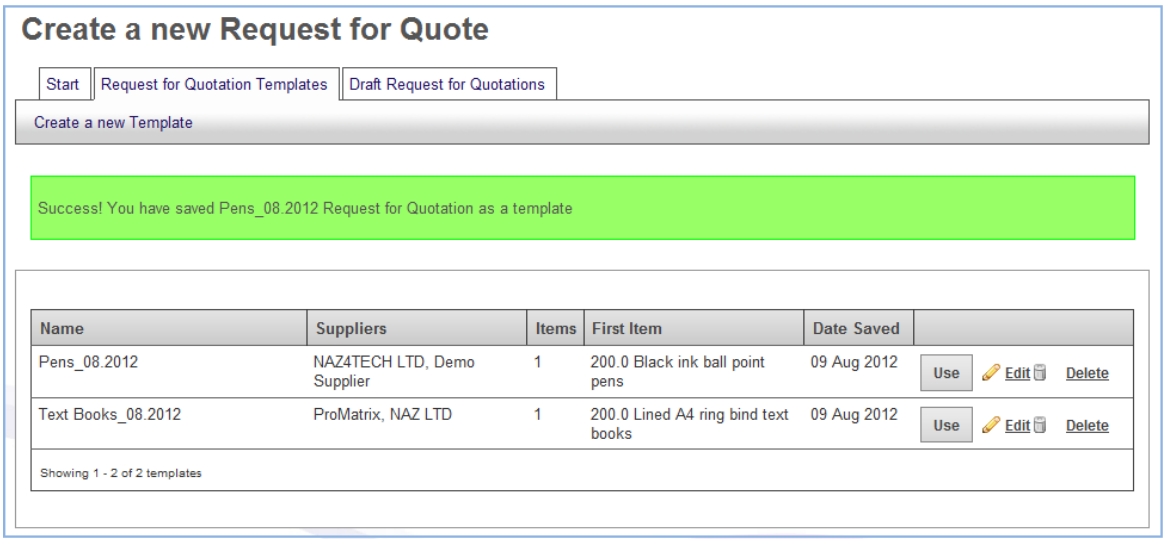
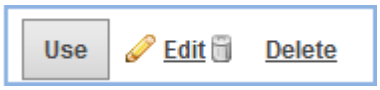



If you need to use the template, click on 'Use' button, the RFQ process will restart from the beginning, where you can edit RFQ details, change add or remove suppliers and change delivery date.




In the list of saved templates, three buttons are displayed:

**Use -** This button allows to reuse the saved template and complete the process of submitting RFQ.

**Edit** - This buttons allows you to edit the template where you can add more lines and add or remove suppliers

.

Note: In the edit mode you will not be able to change the delivery and invoice address and you will not be able to set the delivery date.

**Delete** - This allows you to delete the template from the list.

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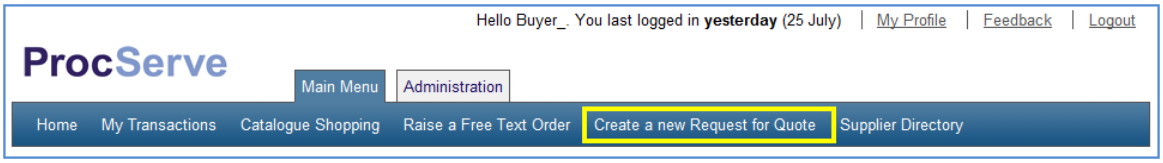
2.2.2.2.2 RFQ Saving as a Draft

**Overview**

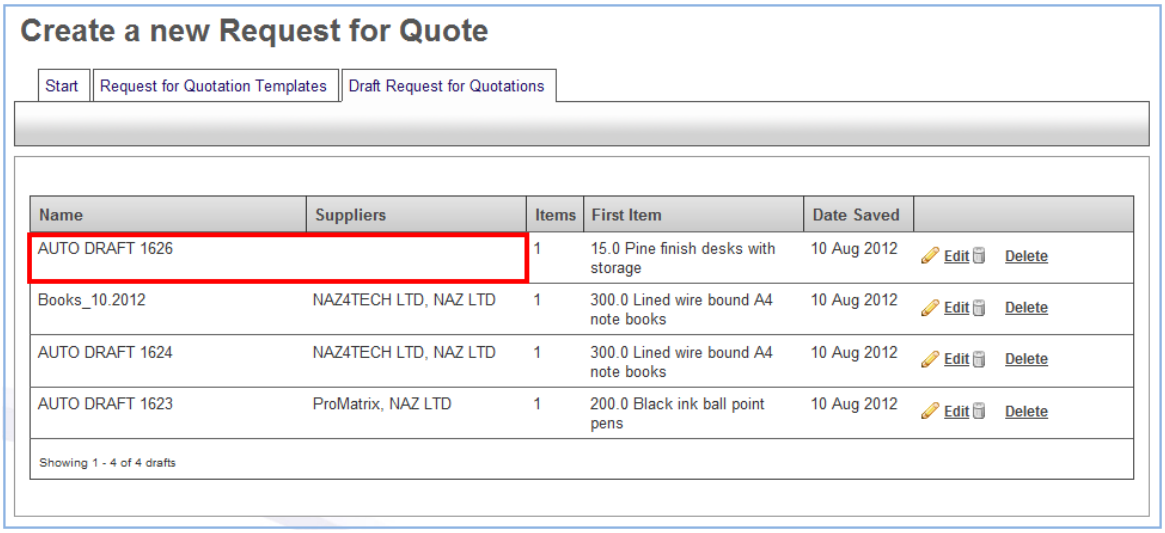
This function will automatically save your RFQ as draft as you complete one step and move to the next. Purpose of this function is if a user has to stop the creating of RFQ at any point, the saved draft allows the user to continue from where it stopped instead of starting from the beginning again.

1. Start RFQ process by selecting 'Create a new Request for Quote'




2. Complete at least one step of RFQ by clicking on the 'Next Step' and then select 'Draft Request for Quotations tab.

You will be presented with list of Draft RFQs as below.




**Note:** Draft will be saved at the point where you select the 'Next Step', as you can see from the above example, no supplier(s) name is populated, this is because the draft automatically saved where you stopped, in this instant, the process has not reached at step where the suppliers are selected.

You can save the RFQ as a draft and give name at any step.

3. Click on 'Save as Draft' button, then scroll down to bottom of the page and enter a suitable name and click on 'Save' button.

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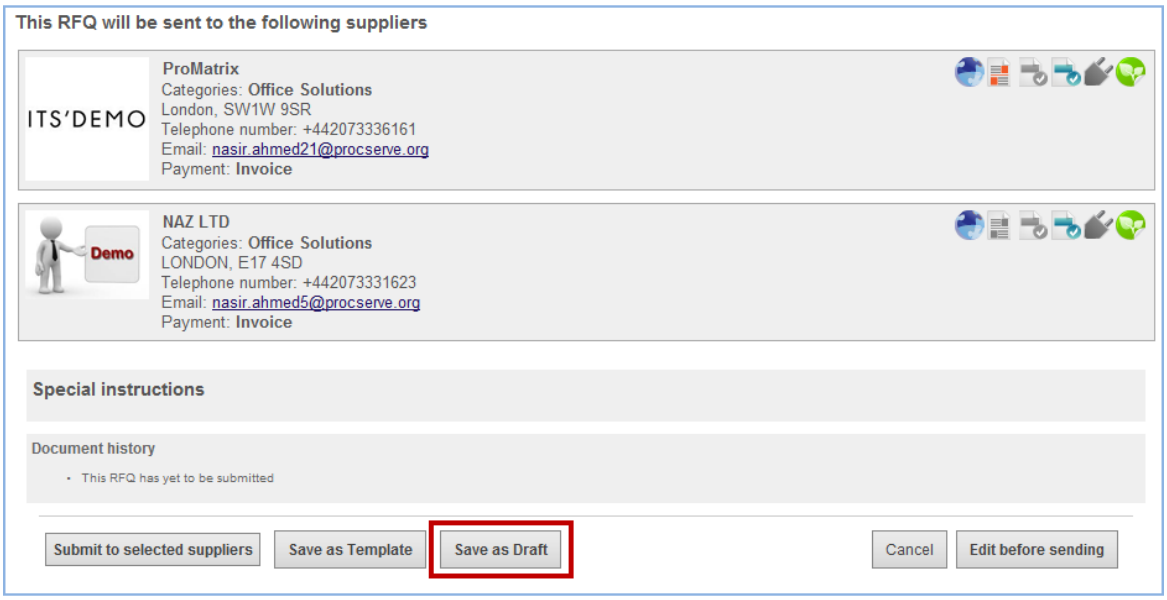


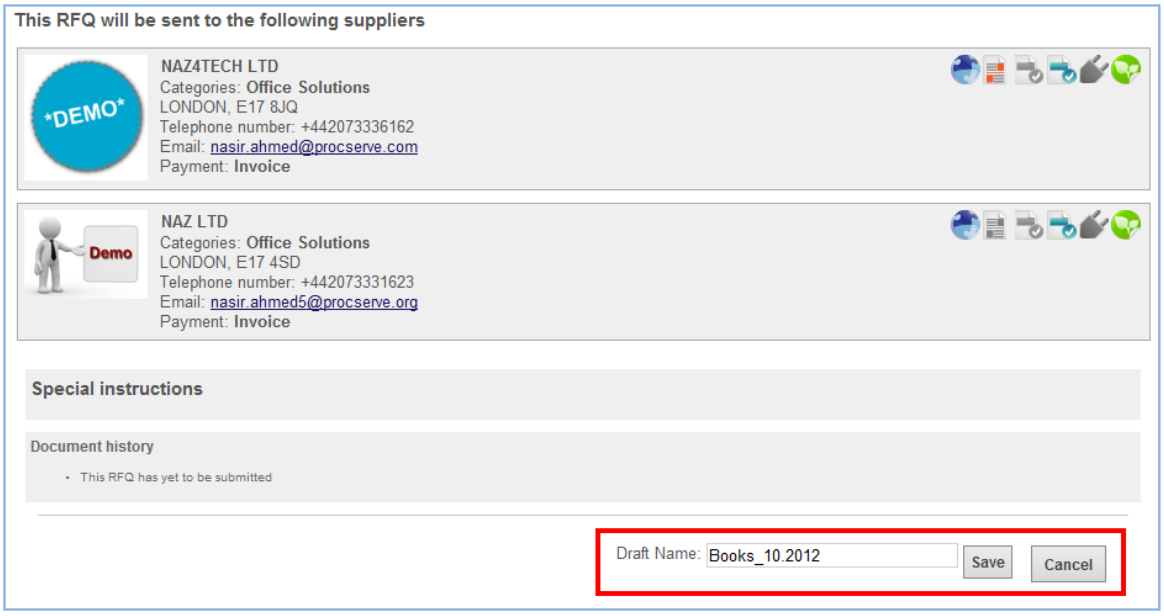


Now you will be presented with list of all saved list of draft RFQs.

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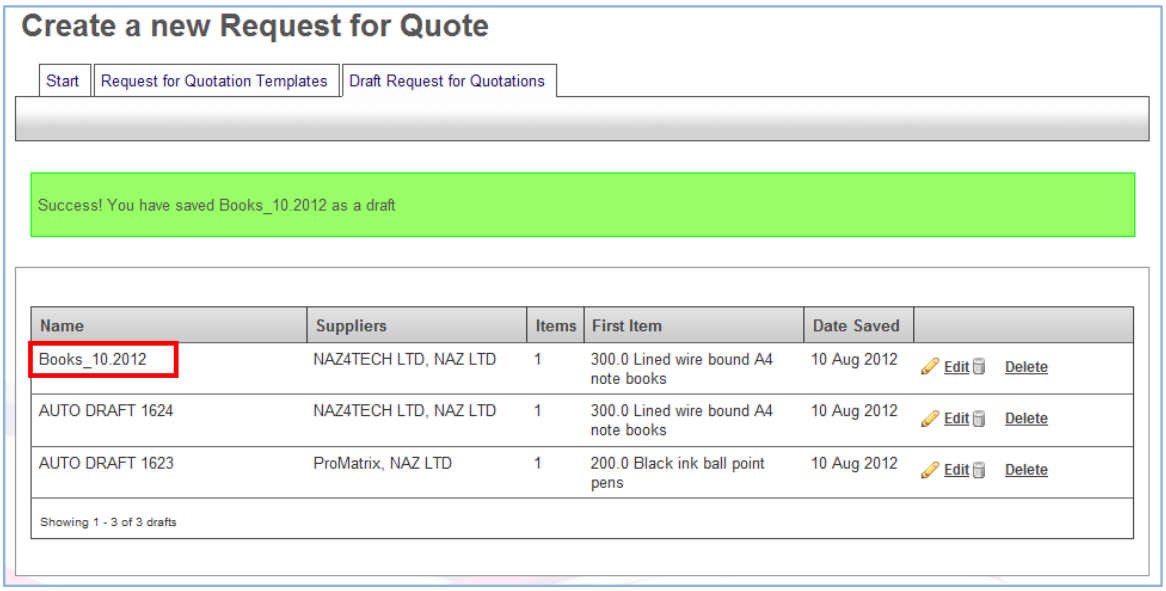


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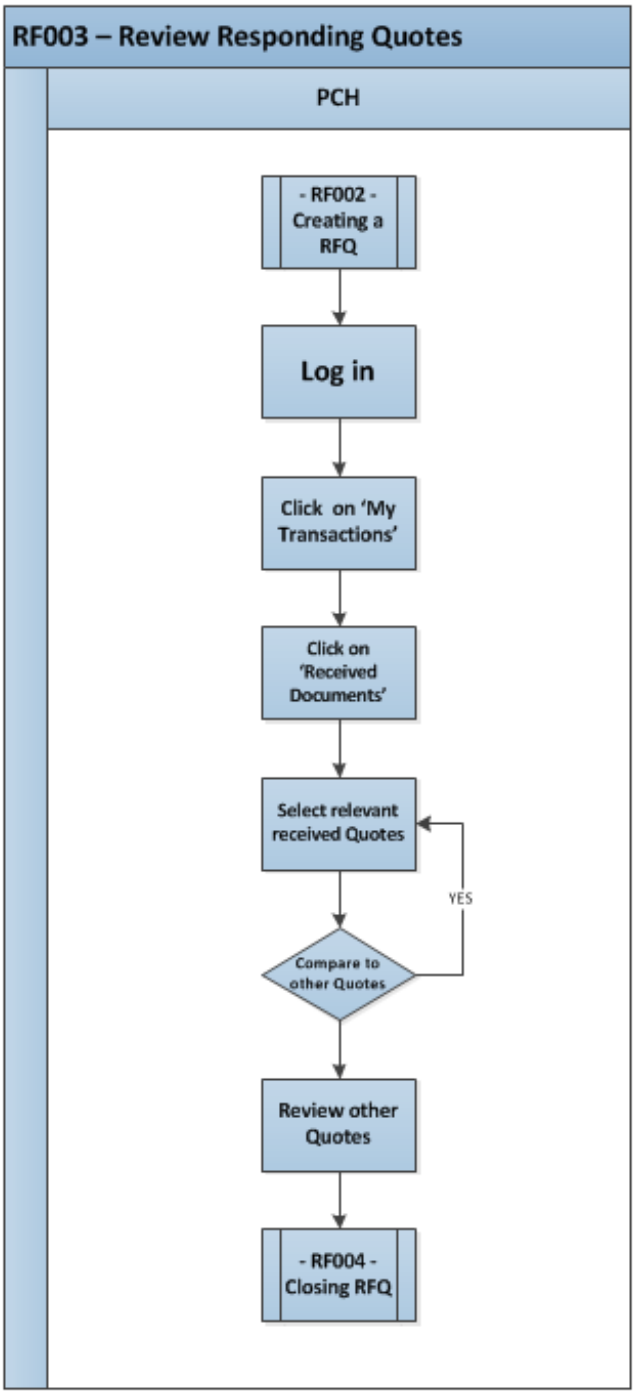
### 2.2.2.3 Reviewing an RFQ

**Overview**

This section shows how you review the quotes you have received.

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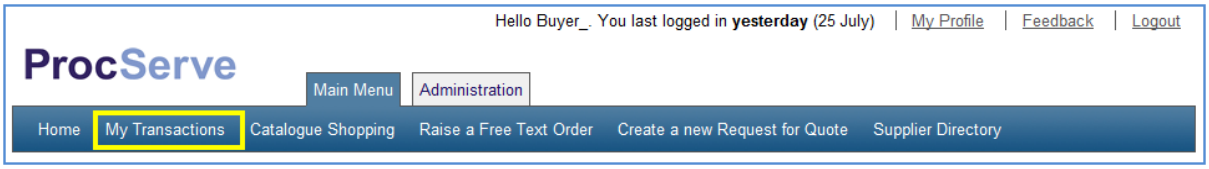
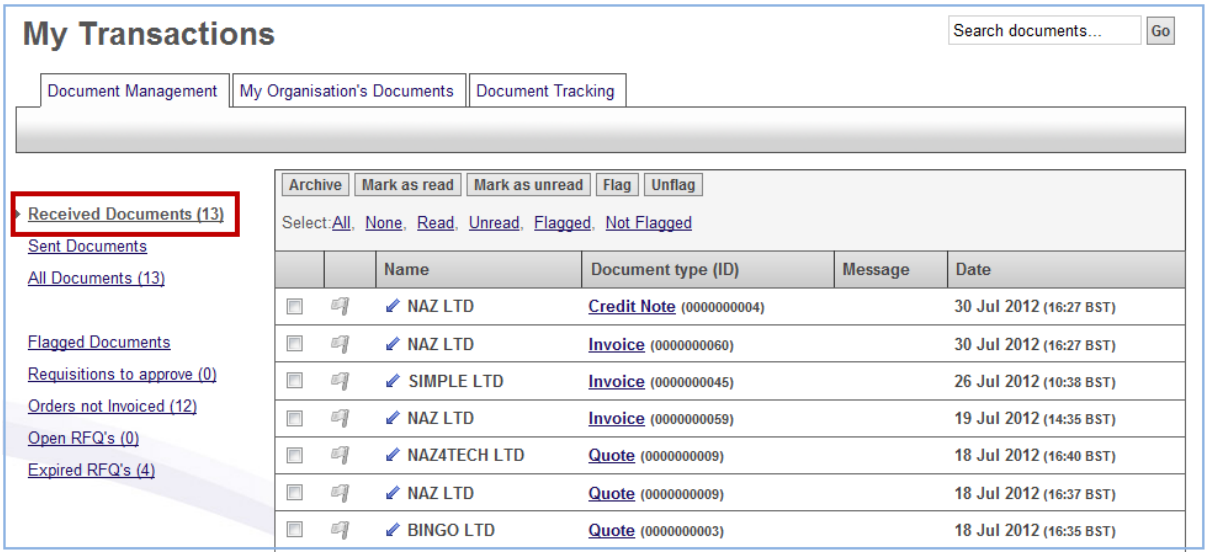
**Reviewing received quotes**

**1. Log in to Procserve Commerce Hub.**

**2. Navigate to 'My Transactions',**

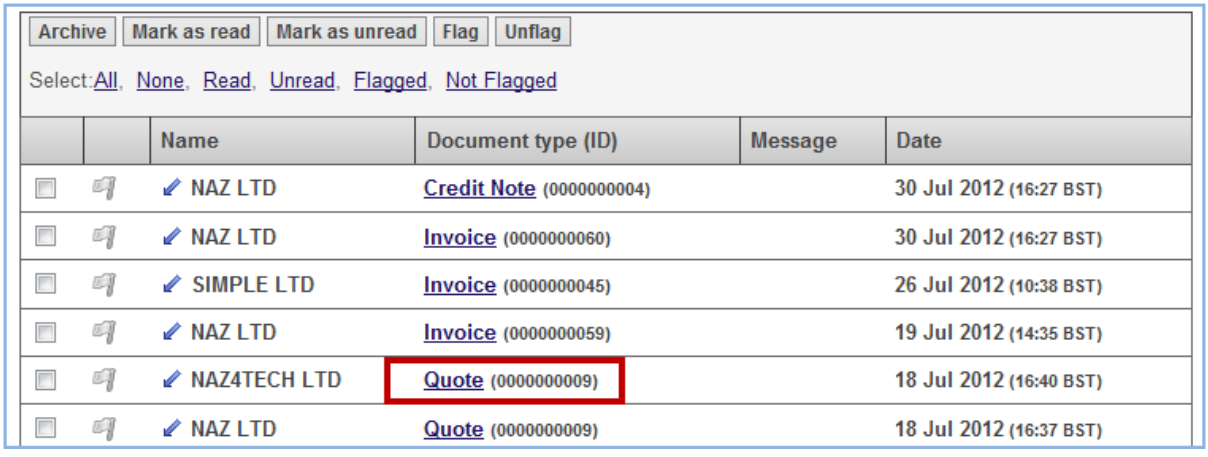



My Transaction page will be displayed, Received Documents will be populated by default, here you will be able to see all of the documents you have received including Invoice, Quotes and Credit Notes.


My Transactions
Search documents...
Go
Document Management
My Organisation's Documents
Document Tracking
Received Documents (13)
Sent Documents
All Documents (13)
Flagged Documents
Requisitions to approve (0)
Orders not Invoiced (12)
Open RFQ's (0)
Expired RFQ's (4)
Archive
Mark as read
Mark as unread
Flag
Unflag
Select: All, None, Read, Unread, Flagged, Not Flagged
Name
Document type (ID)
Message
Date
NAZ LTD Credit Note (0000000004) 30 Jul 2012 (16:27 BST)
NAZ LTD Invoice (0000000060) 30 Jul 2012 (16:27 BST)
SIMPLE LTD Invoice (0000000045) 26 Jul 2012 (10:38 BST)
NAZ LTD Invoice (0000000059) 19 Jul 2012 (14:35 BST)
NAZ4TECH LTD Quote (0000000009) 18 Jul 2012 (16:40 BST)
NAZ LTD Quote (0000000009) 18 Jul 2012 (16:37 BST)
BINGO LTD Quote (0000000003) 18 Jul 2012 (16:35 BST)

You should see all the transactions that you have received.

**3. Click on a quote you have received**


Archive
Mark as read
Mark as unread
Flag
Unflag
Select: All, None, Read, Unread, Flagged, Not Flagged
Name
Document type (ID)
Message
Date
NAZ LTD Credit Note (0000000004) 30 Jul 2012 (16:27 BST)
NAZ LTD Invoice (0000000060) 30 Jul 2012 (16:27 BST)
SIMPLE LTD Invoice (0000000045) 26 Jul 2012 (10:38 BST)
NAZ LTD Invoice (0000000059) 19 Jul 2012 (14:35 BST)
NAZ4TECH LTD Quote (0000000009) 18 Jul 2012 (16:40 BST)
NAZ LTD Quote (0000000009) 18 Jul 2012 (16:37 BST)

This will show the open quote and show all the other documents in the document tree which you can expand to review.

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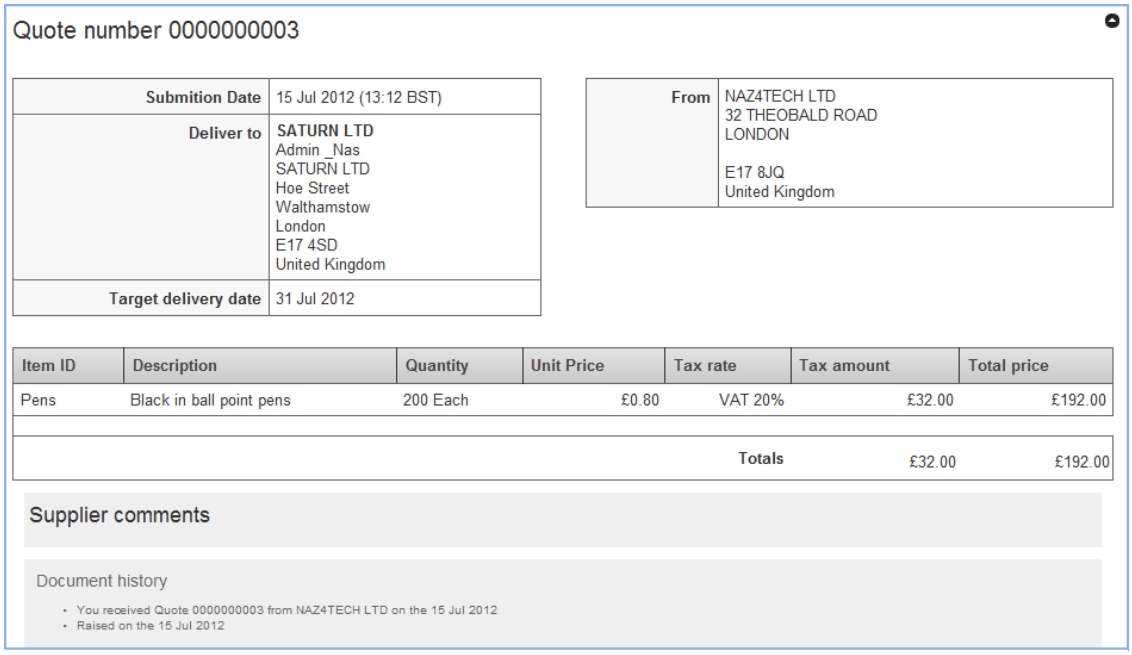


Quote number 0000000003

| | |
|---|---|
| Submition Date | 15 Jul 2012 (13:12 BST) |
| Deliver to | SATURN LTD<br>Admin _Nas<br>SATURN LTD<br>Hoe Street<br>Walthamstow<br>London<br>E17 4SD<br>United Kingdom |
| Target delivery date | 31 Jul 2012 |

| | |
|---|---|
| From | NAZ4TECH LTD<br>32 THEOBALD ROAD<br>LONDON<br><br>E17 8JQ<br>United Kingdom |

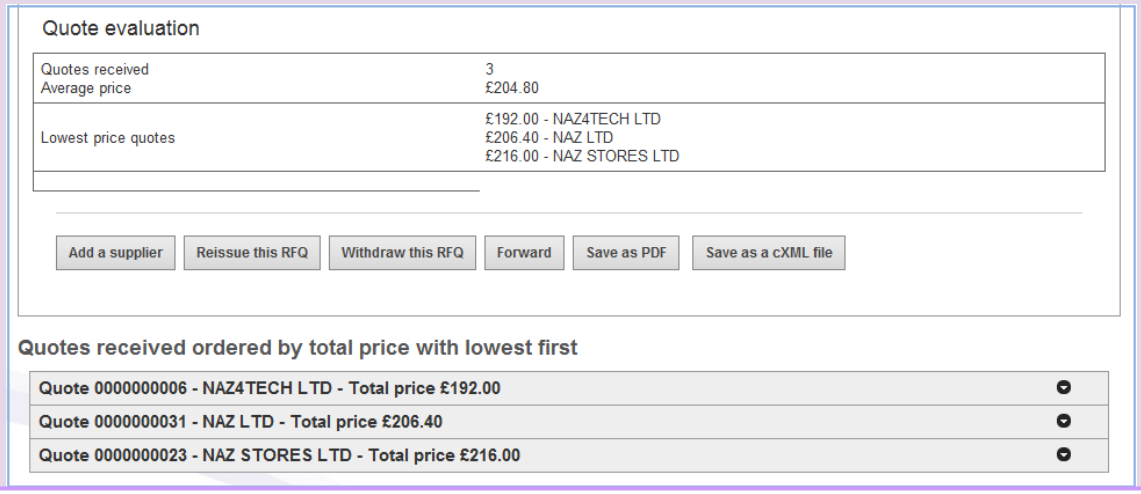
| Item ID | Description | Quantity | Unit Price | Tax rate | Tax amount | Total price |
|---|---|---|---|---|---|---|
| Pens | Black in ball point pens | 200 Each | £0.80 | VAT 20% | £32.00 | £192.00 |
| | | | | Totals | £32.00 | £192.00 |

Supplier comments

Document history

- You received Quote 0000000003 from NAZ4TECH LTD on the 15 Jul 2012
- Raised on the 15 Jul 2012

**Tip!** You can also review an RFQ by viewing the original RFQ at looking at the quotes at the footer of the document:



Quote evaluation

| | |
|---|---|
| Quotes received | 3 |
| Average price | £204.80 |
| Lowest price quotes | £192.00 - NAZ4TECH LTD<br>£206.40 - NAZ LTD<br>£216.00 - NAZ STORES LTD |

Add a supplier | Reissue this RFQ | Withdraw this RFQ | Forward | Save as PDF | Save as a cXML file

Quotes received ordered by total price with lowest first

- Quote 0000000006 - NAZ4TECH LTD - Total price £192.00
- Quote 0000000031 - NAZ LTD - Total price £206.40
- Quote 0000000023 - NAZ STORES LTD - Total price £216.00

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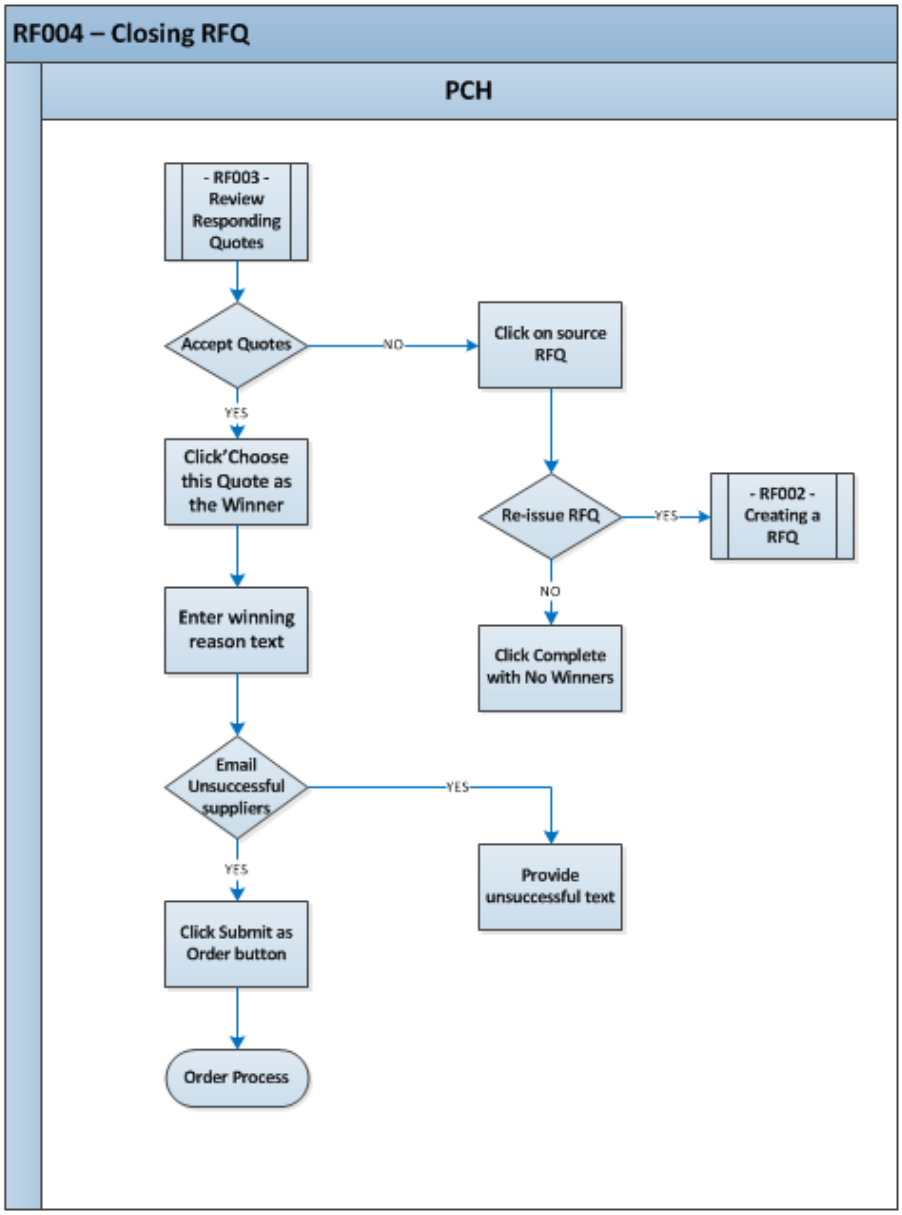
## 2.2.2.4 Closing an RFQ

### Overview

This section shows you how to close an RFQ.




### Closing an RFQ

Having reviewed your quotes you can close your RFQ by choosing a winner or closing the RFQ with no winners.

**Note:** You can withdraw an RFQ before it has closed.

### Awarding an RFQ

**1. Locate the RFQ within 'My Transactions'**

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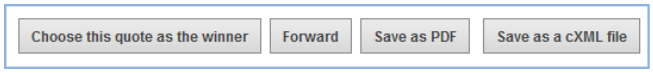
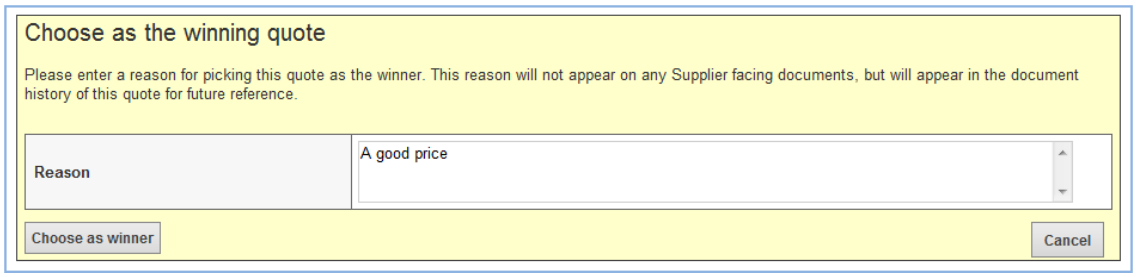
**2. Select the winning quote from 'Received documents' in 'My Transactions'**

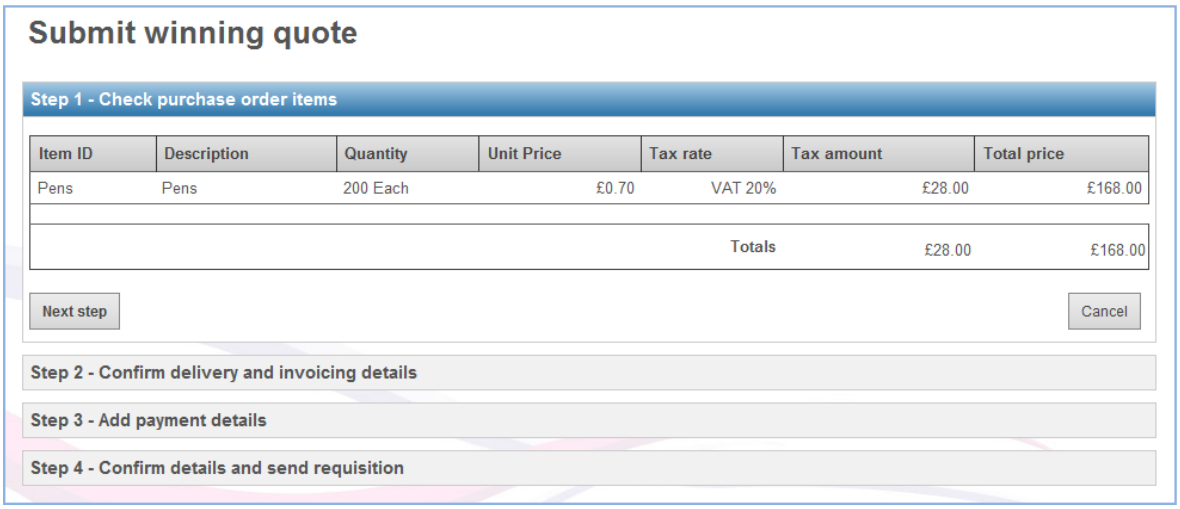
**3. Scroll to the bottom of the quote and click 'Choose this quote as the winner'**




**4. Provide a reason and click 'Choose as winner'**


Choose as the winning quote
Please enter a reason for picking this quote as the winner. This reason will not appear on any Supplier facing documents, but will appear in the document history of this quote for future reference.
Reason
A good price
Choose as winner
Cancel

You will be presented with 'Submit winning quote' page.

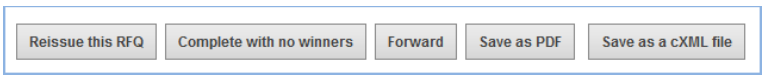



**Tip!** You can convert your winning quote to an order by clicking 'Submit as order' at the footer of the winning quote.

**Closing an RFQ with no winners**

**1. Locate the RFQ within 'My Transactions'**

**2. Scroll to the footer of the RFQ and click 'Complete with no winners'**




**3. Give a reason why you closed the RFQ with no winners and click 'Complete this RFQ'**

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Complete with no winner
Please enter a reason for not choosing any of the quotes received against this RFQ. You reason will be recorded for future reference in this RFQs document history.
Reason
All quotes above target price.
Complete this RFQ
Cancel

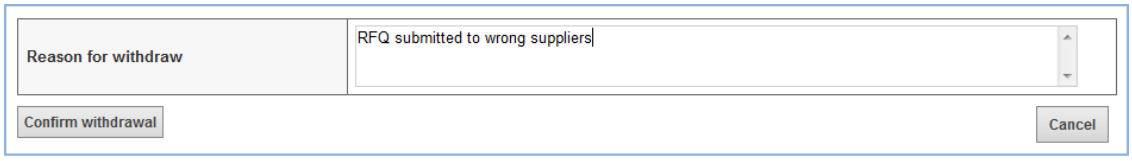
You should be presented with a success message.

**Withdrawing an RFQ**

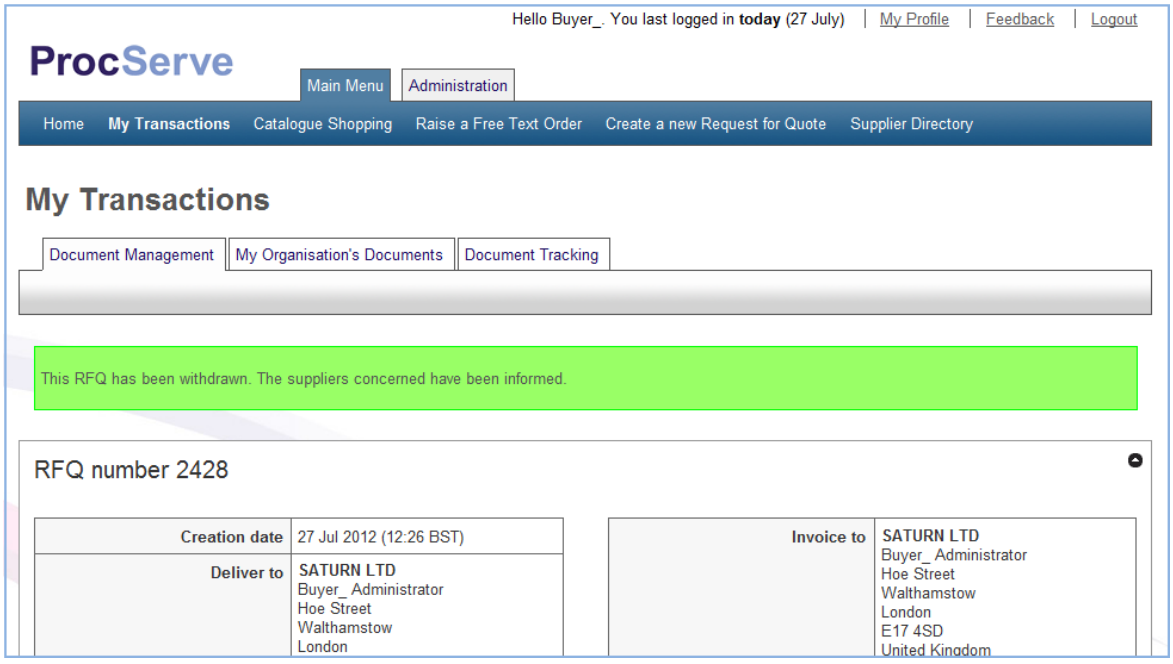
**1. Locate the RFQ within 'My Transactions'**

**2. Scroll to the footer of the RFQ and click 'Withdraw this RFQ'**

**3. Give a reason why the RFQ is being withdrawn**




You will receive on screen confirmation that the RFQ has been withdrawn and the suppliers will be automatically informed.

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## 2.2.3 Supplier Directory

### 2.2.3.1 Introduction to the Supplier Directory

**Overview**

Supplier Directory allows you to view all suppliers registered on the Procserve Trading Network who are available in your marketplace.

**Note:** If you can not see 'Supplier Directory' you may not have the required role. Please check with your system administrator.

**Supplier Capabilities**

There are up to seven Supplier Capability icons associated with each supplier depending upon the suppliers current status.

These capabilities reflect the supplier registration status, their system integration capabilities, multi-buyer status and environmental certification.

The seven Supplier Capability icons are as follows:

Supplier has been pre-registered but have yet to complete the registration process. They are able to receive PO via email but do not have access to the Procserve Commerce Network.

Supplier has completed registration and has full access to the Procserve Commerce Network.

A supplier that currently delivers one or more catalogues to one or more buyers.

A supplier that has submitted at least one quote to an RFQ.

A supplier that has submitted one or more electronic invoices to one or more buyers.

A supplier who is back-end integrated using the Procserve Commerce Network.

Environmentally Certified.

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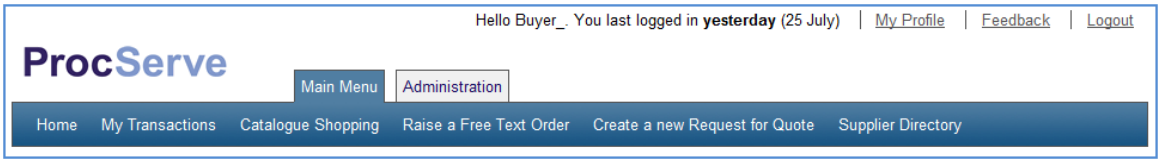
## 2.2.3.2 Viewing Suppliers my Organisation has traded with

### Overview

'Suppliers my Organisation has traded with' shows all the organisations that you have sent an order or a Request for Quote to or have received an Invoice, Quote or Credit Note from.

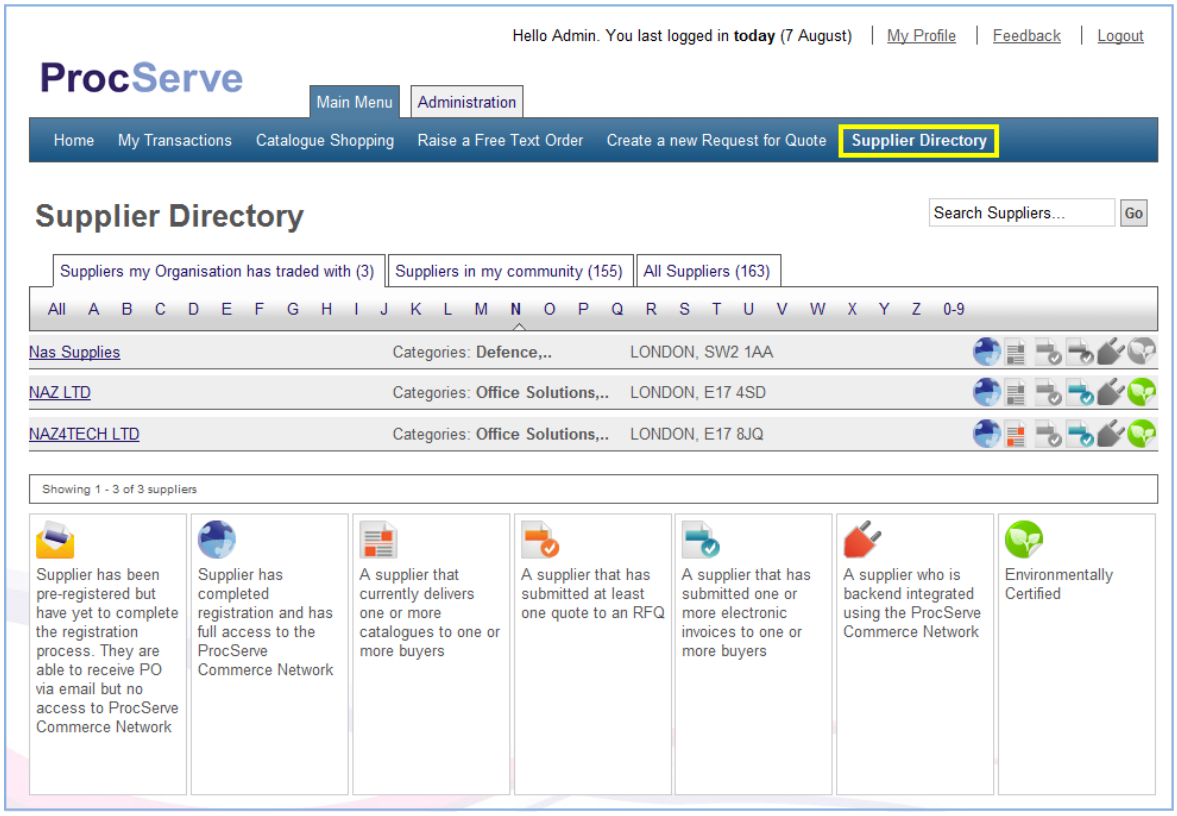
### Using 'Supplier my Organisation has traded with'

### 1. Click on the 'Main Menu' tab within Procserve Commerce Hub




### 2. Click on the 'Supplier Directory'

From here you can view the suppliers by their name using the alpha numeric list [1] and search for a supplier [2].


Hello Admin. You last logged in today (7 August) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Supplier Directory
Search Suppliers...
Go
Suppliers my Organisation has traded with (3)
Suppliers in my community (155)
All Suppliers (163)
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0-9
Nas Supplies
Categories: Defence,..
LONDON, SW2 1AA
NAZ LTD
Categories: Office Solutions,..
LONDON, E17 4SD
NAZ4TECH LTD
Categories: Office Solutions,..
LONDON, E17 8JQ
Showing 1 - 3 of 3 suppliers
Supplier has been pre-registered but have yet to complete the registration process. They are able to receive PO via email but no access to ProcServe Commerce Network
Supplier has completed registration and has full access to the ProcServe Commerce Network
A supplier that currently delivers one or more catalogues to one or more buyers
A supplier that has submitted at least one quote to an RFQ
A supplier that has submitted one or more electronic invoices to one or more buyers
A supplier who is backend integrated using the ProcServe Commerce Network
Environmentally Certified

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### 2.2.3.3 Viewing All Available Suppliers in the Community

**Overview**

'All available suppliers' shows all the organisations that are on the Procserve Trading Network and available in your marketplace.

**Using 'All available suppliers'**

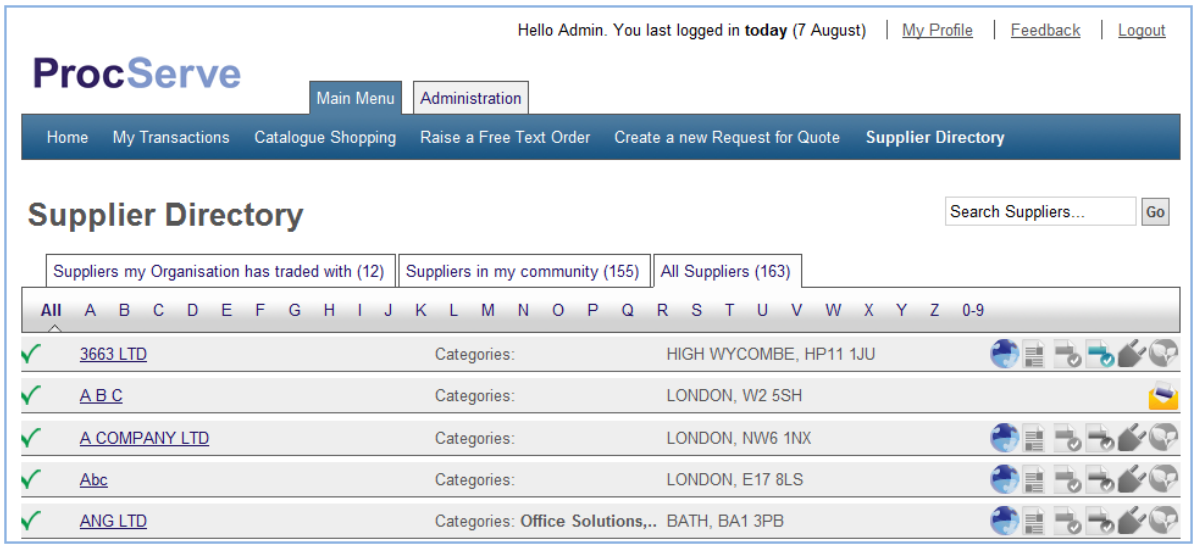
**1. Click on the 'Main Menu' tab within Procserve Commerce Hub**

**2. Click on the 'Supplier Directory' tab**

**3. Click on the 'All suppliers' tab**

From here you can view the suppliers by their name using the alpha numeric list [1] and search for a supplier [2]

**Note:** You can search the Supplier Directory by suppliers name, category, DUNS number, contact details or description.


Hello Admin. You last logged in today (7 August) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Home
My Transactions
Catalogue Shopping
Raise a Free Text Order
Create a new Request for Quote
Supplier Directory
Supplier Directory
Search Suppliers...
Go
Suppliers my Organisation has traded with (12)
Suppliers in my community (155)
All Suppliers (163)
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0-9
3663 LTD Categories: HIGH WYCOMBE, HP11 1JU
A B C Categories: LONDON, W2 5SH
A COMPANY LTD Categories: LONDON, NW6 1NX
Abc Categories: LONDON, E17 8LS
ANG LTD Categories: Office Solutions,.. BATH, BA1 3PB

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## 2.2.4 Document Tracker

### 2.2.4.1 Introduction to Document Tracker

**Overview**

The Document Tracker is an online solution providing an overview of the history and most recent state of transaction documents. Users can see the last status of a transaction with its associated timestamp.
**Note:** Access to Document Tracker is dependant on your organisation set up and roles (Buyer Reporter)
.

The key areas that the Document Tracker allows Buyers to view details of relating to their documents include:

1. Who the Supplier is
2. The date and time the specified document was:
   a. received by the Procserve Trading Network
   b. relayed by Procserve to the Supplier
   c. opened or read by Supplier within the Supplier Portal
   d. a document was downloaded or uploaded by the Supplier using SWS or SPConnect
3. If an invoice has been sent against the purchase order and its associated date
4. A visual representation of the document onscreen
5. A full timestamp audit trail of the document through the Procserve Trading Network
6. The last status of the document e.g. relayed to a Supplier or an invoice has been received

The Document Tracker also offers the ability to set filters to refine your searching and both show these results onscreen or download them in a Microsoft Excel. The searchable fields currently available include:

1. Document ID
2. Supplier Name
3. Date From and To
4. Document Type
5. Event Type

Any combination of these filters details can be selected to enhance and restrict the search results.

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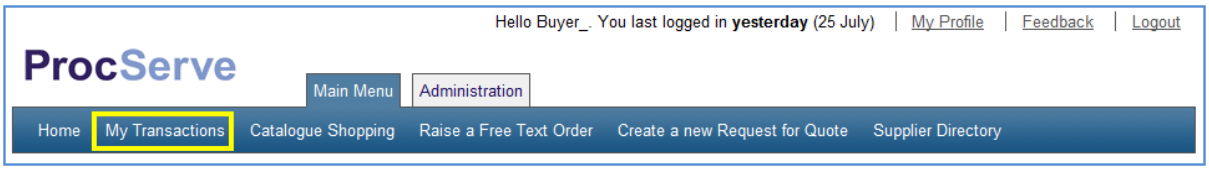
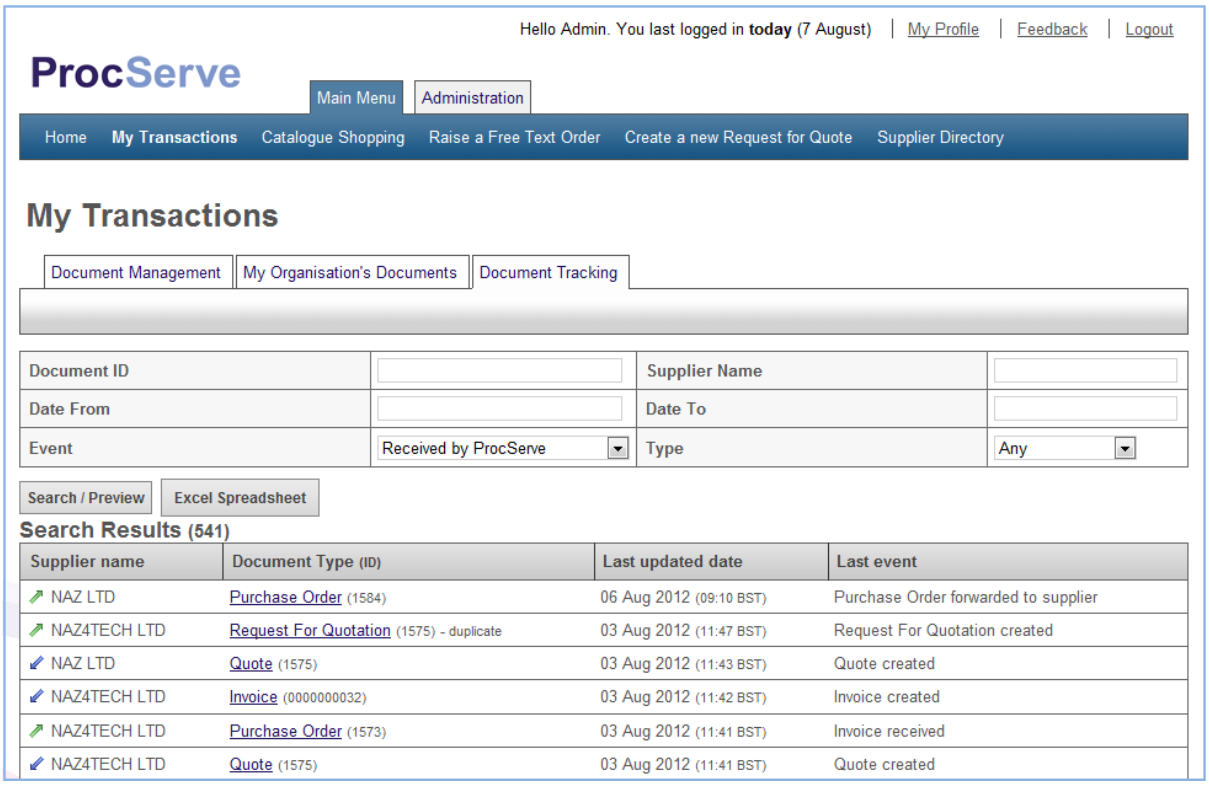
## 2.2.4.2 Using Document Tracker

### To view the Document Tracker

### 1. From 'Main Menu' click on 'My Transactions'




### 2. Click on 'Document Tracking'

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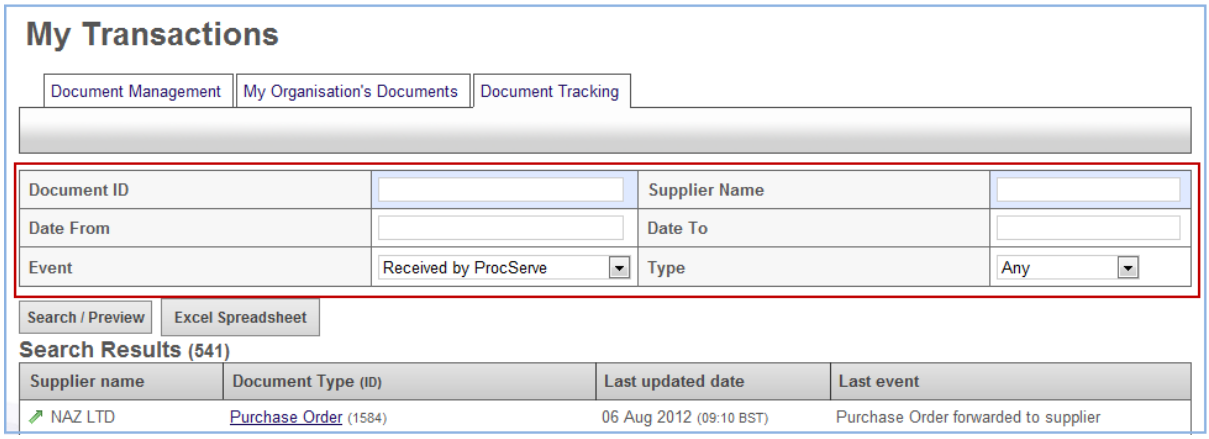
### Searching for Documents

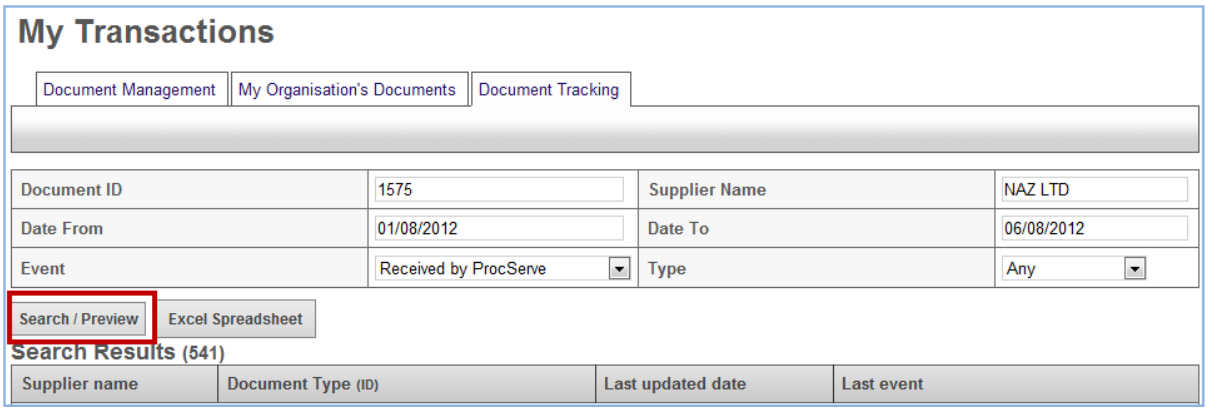
The Document Tracker has many different filters and once set, by using the Search/Preview button, will display the results onscreen. Alternatively they may also be downloaded into a Microsoft Excel file by selecting the Excel Spreadsheet button once you have set your filters and the results have been returned. The searchable fields currently available include:

| Label | Description |
|---|---|
| Document ID (text entry) | Enter your purchase order, invoice or credit note reference into this box to return a specific document |
| Supplier Name (text entry) | Enter the name of the Supplier as registered on the Procserve Trading Network |
| Date From and To (select box) | By entering a From date all documents form that date onwards will be returned. By enter a To date all document prior to the specified date will be returned. By selecting both then documents within the date range specified will be returned |
| Type (drop down list) | Choose from either PO, Invoice or Credit Notes |
| Event (drop down list) | Events can be used to specify statuses of documents, further details of which are outlined below |

**1. You can search for documents using any of the search fields highlighted:**




**2. Once you have added your search term click 'Search / Preview'**

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### Applying an Event Type filter to your documents

The Document Tracker has **Event** types that can be set to view the last event of the documents based on the set filters. These Events are as follows:

| Event Filters | Event Filter Details |
|---|---|
| Received by Procserve | Shows all documents |
| Not Viewed or Downloaded | Shows all orders not viewed by the Supplier in the Portal or downloaded by either SWS or SP Connect |
| Viewed/Downloaded | Shows all orders viewed by a Supplier or downloaded by either SWS or SP Connect |
| No corresponding documents | Shows all purchase orders that have not been invoiced |
| Has corresponding documents | Shows all purchase orders that have been invoiced |
| Error occurred | Shows all documents that are currently being investigated due to processing issues |

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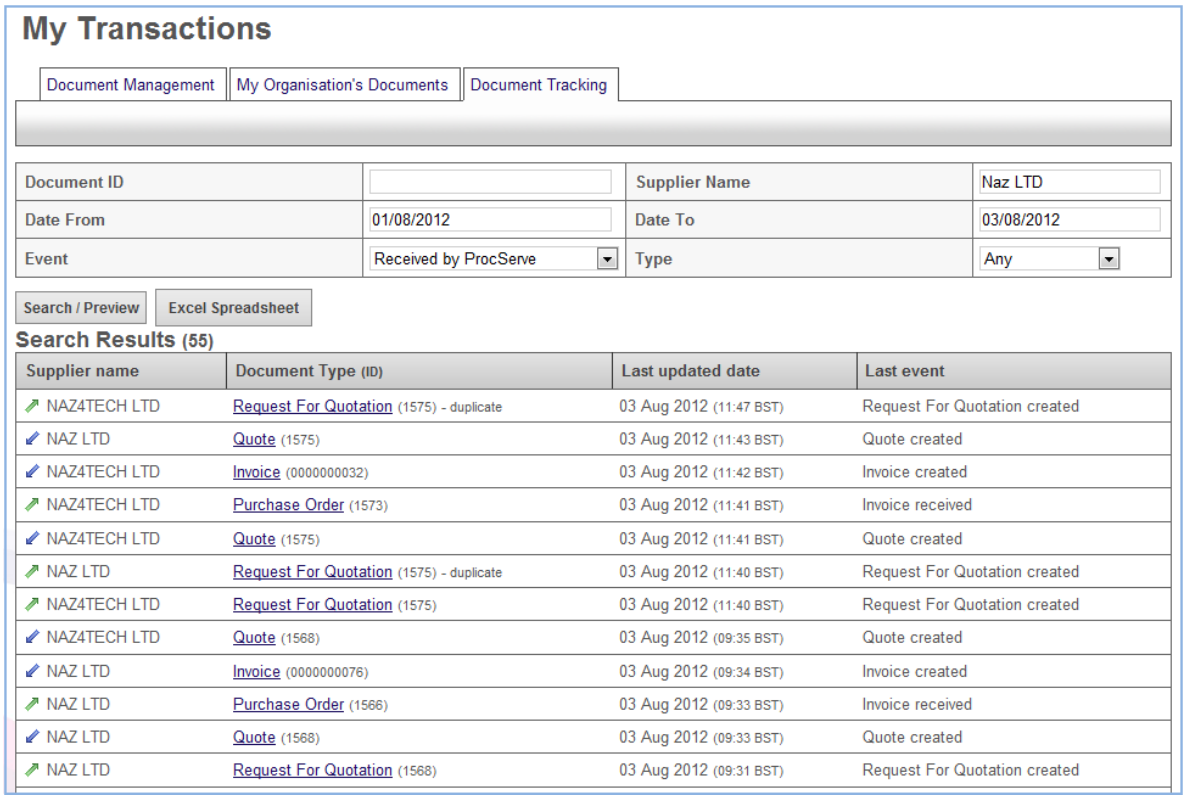
## 2.2.4.3 Downloading the transactions to Excel

### Overview

You can download transactions in Document Tracking to Excel for ease of viewing and data manipulation.

Below is an example of the headings and type of data you can report on:




### Downloading records to Excel

**1. Filter the documents you to result**

**2. When satisfied with results to export click 'Excel Spreadsheet'**

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| | A | B | C | D | E | F |
|---|---|---|---|---|---|---|
| 1 | Supplier name | Document Type | Document Type | Last updated dat | Last updated dat | Last event |
| 2 | NAZ LTD | 1584 | Purchase Order | 06 Aug 2012 | 09:10 BST | Purchase Order forwarded to supplier |
| 3 | NAZ4TECH LTD | 1575 | Request For Quotation | 03 Aug 2012 | 11:47 BST | Request For Quotation created |
| 4 | NAZ LTD | 1575 | Quote | 03 Aug 2012 | 11:43 BST | Quote created |
| 5 | NAZ4TECH LTD | 0000000032 | Invoice | 03 Aug 2012 | 11:42 BST | Invoice created |
| 6 | NAZ4TECH LTD | 1573 | Purchase Order | 03 Aug 2012 | 11:41 BST | Invoice received |
| 7 | NAZ4TECH LTD | 1575 | Quote | 03 Aug 2012 | 11:41 BST | Quote created |
| 8 | NAZ LTD | 1575 | Request For Quotation | 03 Aug 2012 | 11:40 BST | Request For Quotation created |
| 9 | NAZ4TECH LTD | 1575 | Request For Quotation | 03 Aug 2012 | 11:40 BST | Request For Quotation created |
| 10 | NAZ4TECH LTD | 1568 | Quote | 03 Aug 2012 | 09:35 BST | Quote created |
| 11 | NAZ LTD | 0000000076 | Invoice | 03 Aug 2012 | 09:34 BST | Invoice created |
| 12 | NAZ LTD | 1566 | Purchase Order | 03 Aug 2012 | 09:33 BST | Invoice received |
| 13 | NAZ LTD | 1568 | Quote | 03 Aug 2012 | 09:33 BST | Quote created |
| 14 | NAZ LTD | 1568 | Request For Quotation | 03 Aug 2012 | 09:31 BST | Request For Quotation created |
| 15 | NAZ4TECH LTD | 1568 | Request For Quotation | 03 Aug 2012 | 09:31 BST | Request For Quotation created |
| 16 | NAZ4TECH LTD | 1562 | Quote | 03 Aug 2012 | 09:12 BST | Quote created |
| 17 | NAZ LTD | 1562 | Quote | 03 Aug 2012 | 09:11 BST | Quote created |
| 18 | NAZ LTD | 1562 | Request For Quotation | 03 Aug 2012 | 09:09 BST | Request For Quotation created |
| 19 | NAZ4TECH LTD | 1562 | Request For Quotation | 03 Aug 2012 | 09:09 BST | Request For Quotation created |
| 20 | ProMatrix | 0000000069 | Invoice | 02 Aug 2012 | 17:29 BST | Invoice created |
| 21 | ProMatrix | 1559 | Purchase Order | 02 Aug 2012 | 17:29 BST | Invoice received |
| 22 | ProMatrix | 1554 | Quote | 02 Aug 2012 | 15:04 BST | Quote created |
| 23 | NAZ4TECH LTD | 1554 | Quote | 02 Aug 2012 | 15:04 BST | Quote created |
| 24 | NAZ LTD | 1554 | Quote | 02 Aug 2012 | 15:03 BST | Quote created |
| 25 | NAZ4TECH LTD | 1554 | Request For Quotation | 02 Aug 2012 | 14:59 BST | Request For Quotation created |
| 26 | NAZ LTD | 1554 | Request For Quotation | 02 Aug 2012 | 14:59 BST | Request For Quotation created |
| 27 | ProMatrix | 1554 | Request For Quotation | 02 Aug 2012 | 14:59 BST | Request For Quotation created |
| 28 | ProMatrix | 1547 | Request For Quotation | 01 Aug 2012 | 13:37 BST | Request For Quotation created |
| 29 | COWBOYS LTD | 1547 | Request For Quotation | 01 Aug 2012 | 13:37 BST | Request For Quotation created |
| 30 | Demo Supplier | 1547 | Request For Quotation | 01 Aug 2012 | 13:37 BST | Request For Quotation created |
| 31 | COWBOYS LTD | 1545 | Request For Quotation | 01 Aug 2012 | 13:36 BST | Request For Quotation created |
| 32 | ProMatrix | 1545 | Request For Quotation | 01 Aug 2012 | 13:36 BST | Request For Quotation created |
| 33 | COWBOYS LTD | 1545 | Request For Quotation | 01 Aug 2012 | 13:30 BST | Request For Quotation created |
| 34 | ProMatrix | 1545 | Request For Quotation | 01 Aug 2012 | 13:30 BST | Request For Quotation created |

A new window will open with an option to Open or Save the file.

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# 2.3 Procserve Commerce Hub Administration

## 2.3.1 Overview

**Administration Menu Options**

**Note:** Dependant on your organisation set up and roles you have been given, you may not have access to some of the menu options.

**1] Community Management** - Within Community Management you can edit the helpdesk contact details, organisations and catalogue content and views.

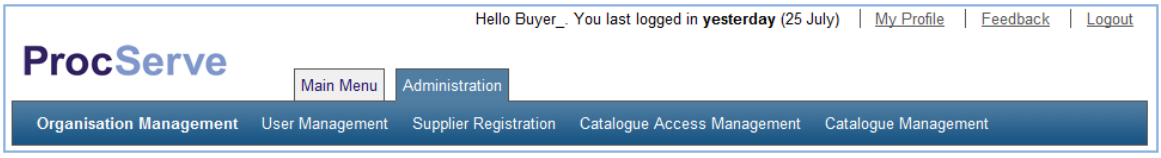
**2] Organisation Management** - You can view and edit the the general address details of your organisation in 'Organisation Management'.

**3] User Management** - You can add, edit and deactivate users within your organisation in 'User Management'

**4] Supplier Registration** - You can manage your supplier adoption in 'Supplier Registration'

**5] Catalogue Access Management** - You can determine which organisations and users can see what content in 'Catalogue Access Management'

**6] Catalogue Management** - You can upload and manage your catalogue content in 'Catalogue Management'

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## 2.3.2 Hybrid Communities

### 2.3.2.1 Overview

A ‘Hybrid Community’ is used where a community has a significant need to share content but still require individual buying organisation to control some of their content, in particular double Punch-Out suppliers.

Managing the sharing of catalogues and classification views will be done from within the Procserve Commerce Hub. The community members will have a list of catalogues available to them. The catalogues available consist of:

- Community catalogues made available to all members
- Catalogues other community members have shared with the buying organisation
- Catalogues shared by network members outside the hybrid community
- Private catalogues only available to the individual buyer

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### 2.3.2.2 Sharing catalogues within a Hybrid Community

Managing the sharing of catalogues and classification views will be done from the Procserve Commerce Hub. The community members will have a list of catalogues available to them. The catalogues available consist of:

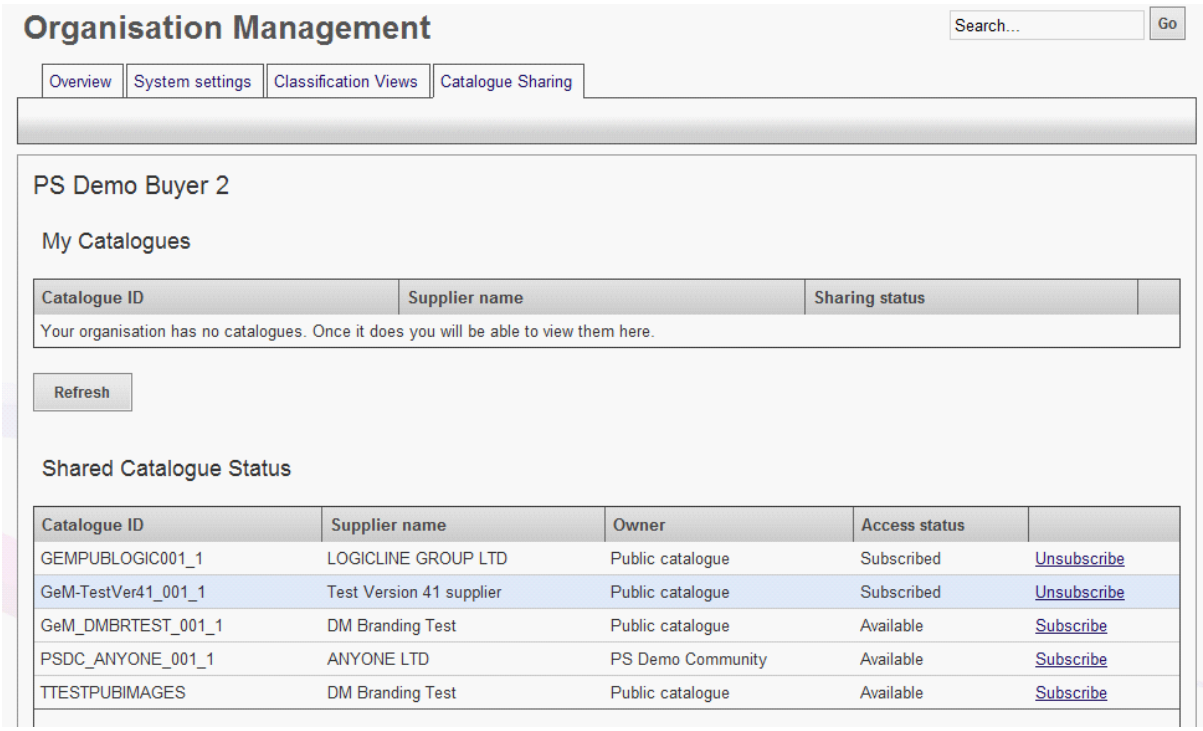
- Community catalogues made available to all members
- Catalogues other community members have shared with the buying organisation
- Catalogues shared by network members outside the hybrid community
- Private catalogues only available to the individual buyer

To share catalogues across the community or with specific buying organisations within your community, select the 'Admin' tab and then 'Catalogue Sharing'

There are two catalogue sections – 'My Catalogues' and 'Shared Catalogues'

To share a catalogue click 'Edit Sharing'. It provides the following options:

- *Shared with whole community* – shares with all Buying organisations in the community
- *Shared with specific organisations within my community* - allows you to select which Buying organisations can have access




Selecting 'Shared with whole community' and clicking 'Add Share' will display a green confirmation message:

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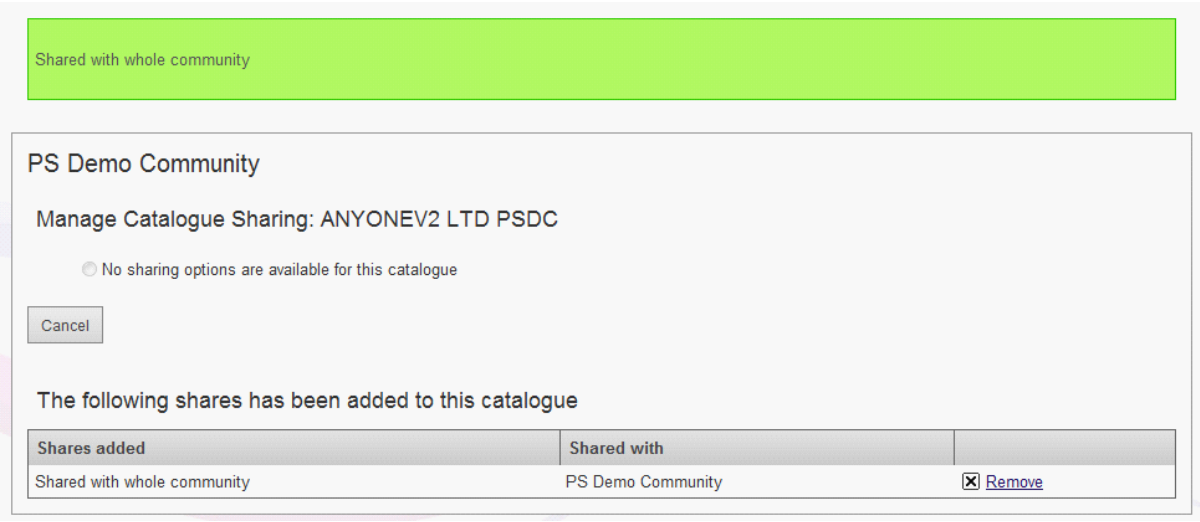
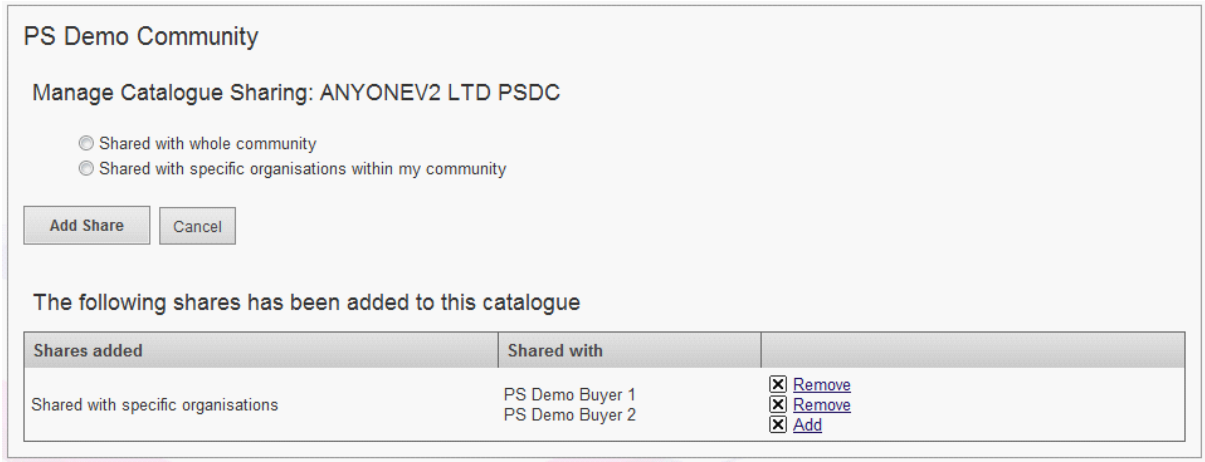



If you select 'Shared with specific organisations within my community' you will then be prompted to select specific Buying organisations from the community which you can share the catalogue with.

Click 'Add Share' against Buying organisation that require access to that catalogue




To remove the sharing classification of your catalogue from selected Buying Organisations, simply click 'Remove' for that particular Buying organisation from the list of shares.

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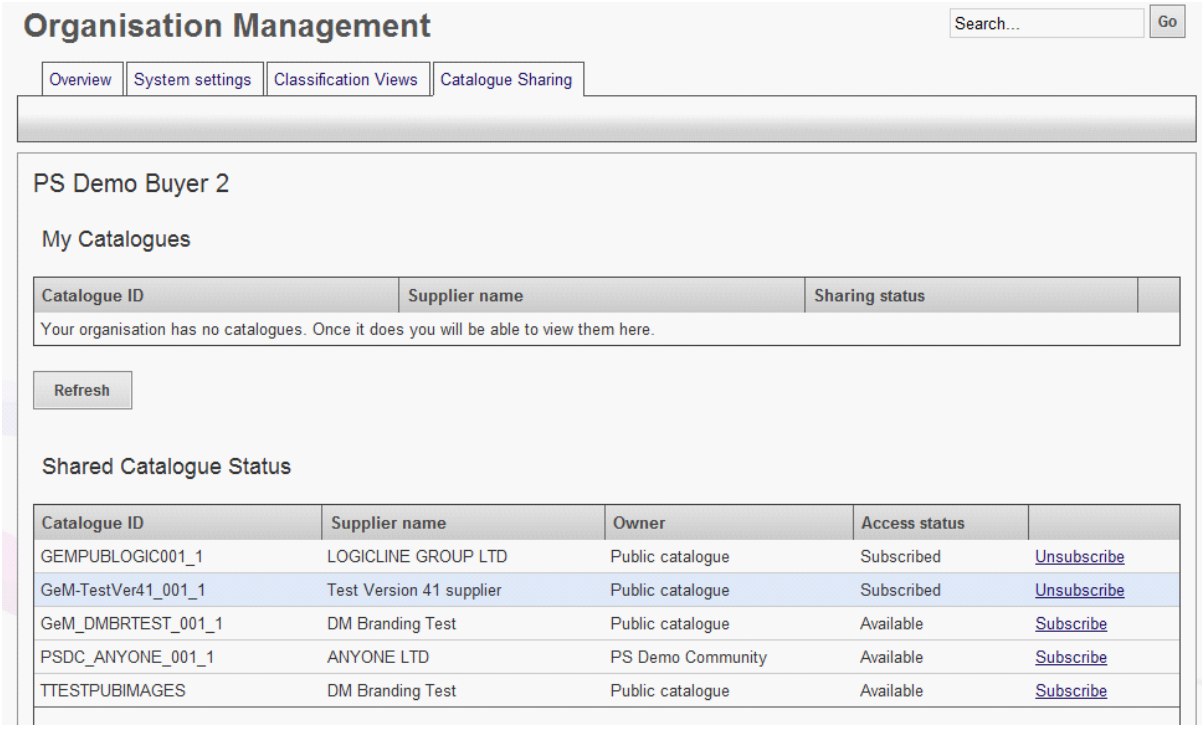
| Shares added | Shared with | |
|---|---|---|
| Shared with specific organisations | PS Demo Buyer 1<br>PS Demo Buyer 2 | Remove<br>Remove<br>Add |

**ORGANISATION MANAGEMENT**

As a Buying Organisation that is part of a Hybrid Community you have the ability to subscribe or unsubscribe to catalogues that have been shared with you.

Under the 'Catalogue Sharing' tab it will provide a list of shared catalogues, either from the Community or other Buying organisations.




In order to add a catalogue to your user's classification views, you must first subscribe to the catalogue, which you do by clicking on the Subscribe link. To search for catalogues, you can use the search box in the top right of the screen.

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## 2.3.3 Managing your Supplier Adoption

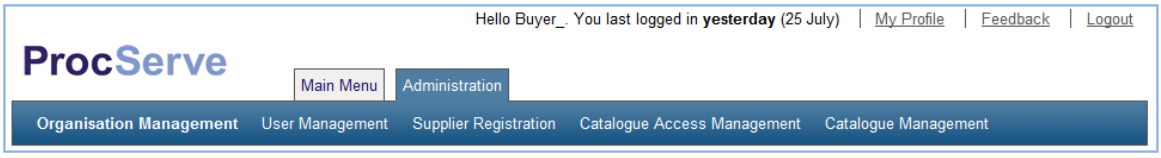
### 2.3.3.1 Overview of Supplier Registration

**Overview**

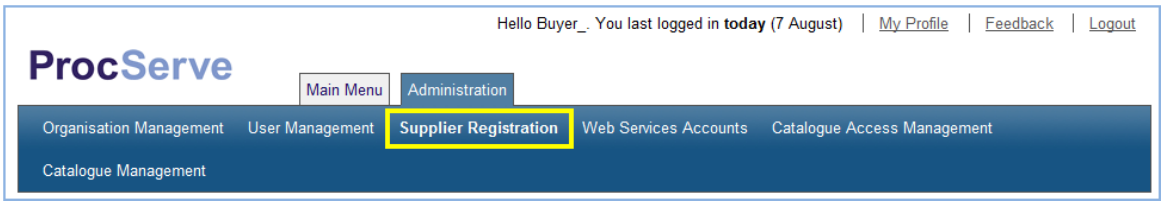
This section describes how you can add new suppliers to the Procserve Trading Network. By loading a suppliers details they will automatically be added as a basic supplier. This section looks at both the loading process and the tools to progress supplier registration.

**Supplier Registration**

**1. Click on the 'Administration' tab**



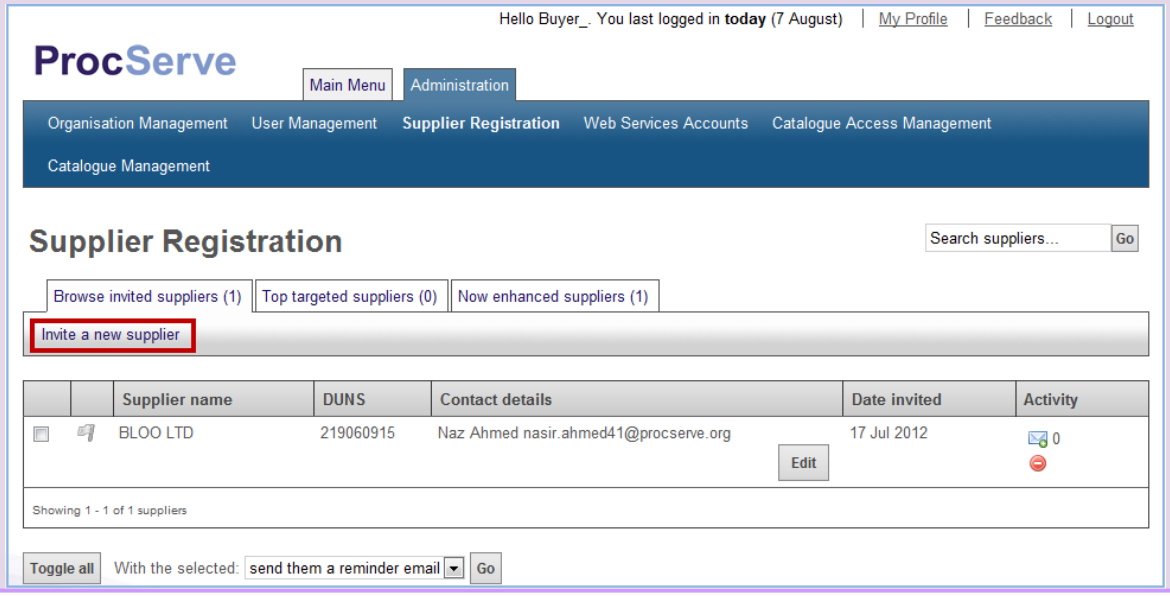

**2. Click 'Supplier Registration'**




From here you can see the three tabs used in Supplier Registration

**Tip! Adding new suppliers**

You can invite new suppliers to join the Procserve Trading Network. For more information on this view the 'Registering New Suppliers'.




**Browse invited suppliers**

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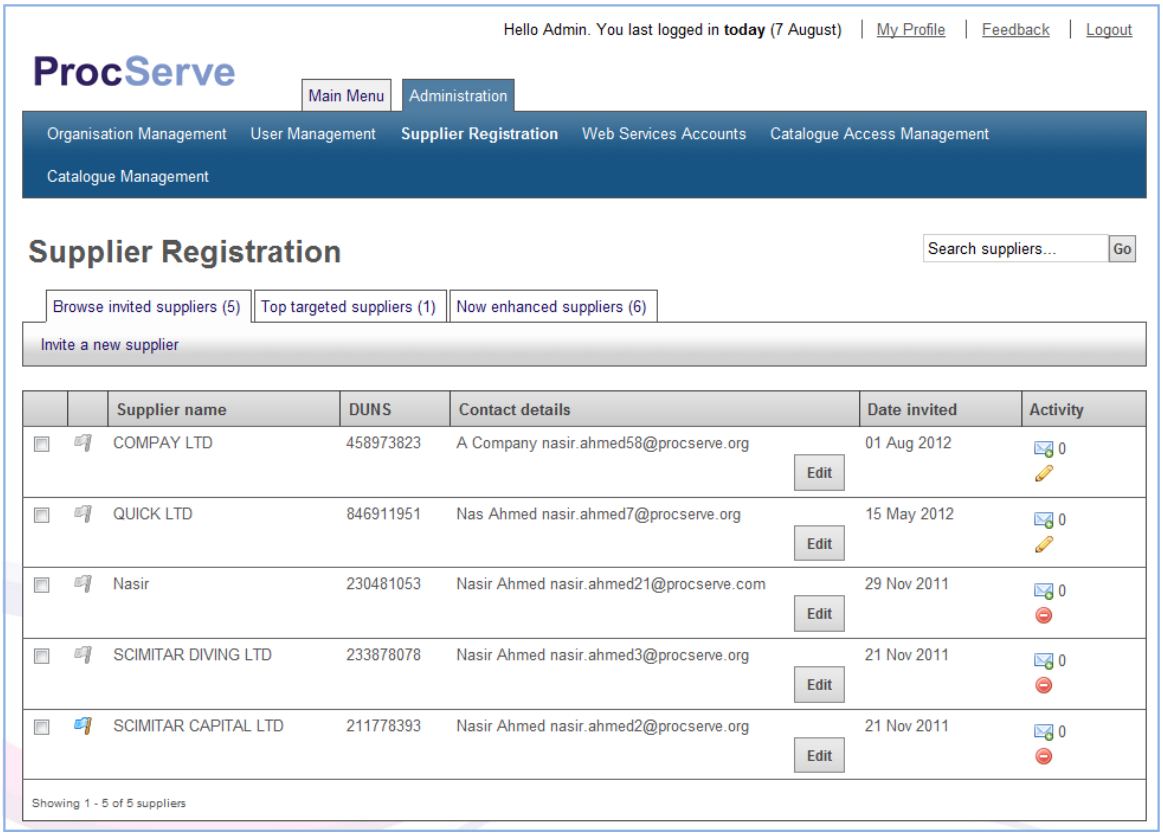
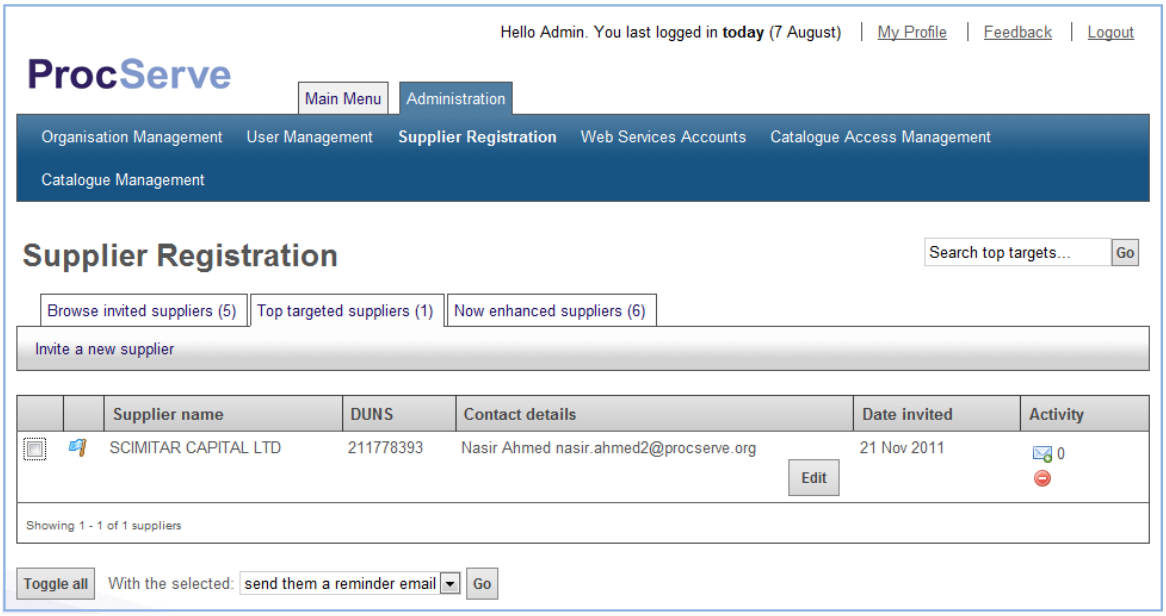
You can search all the suppliers you have added and have not yet registered. You can also remind selected suppliers to complete registration.




**Top targeted suppliers**

You can add suppliers to 'Top targeted suppliers' to ensure that you focus effort on adopting these. See the 'Targeting your Suppliers' for more information.




**Now enhanced suppliers**

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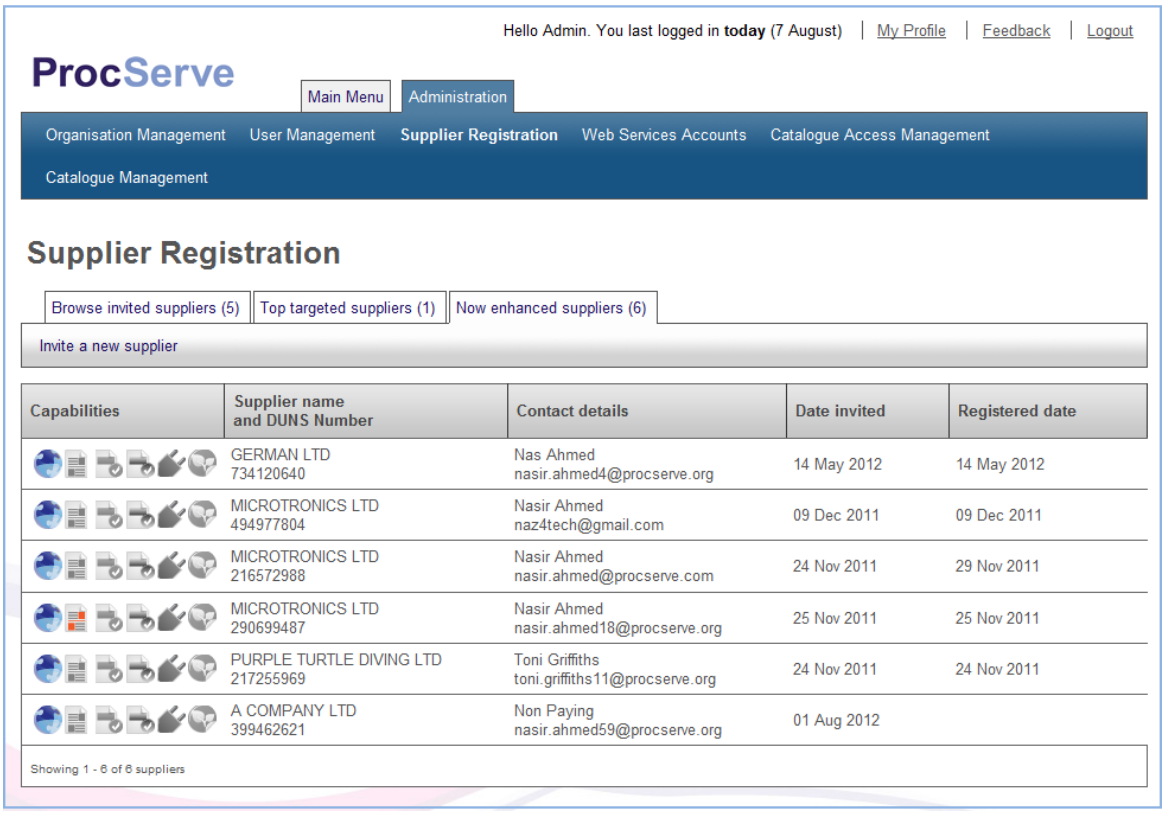
You can view the suppliers you have invited that have registered on the Procserve Trading Network and the status they have achieved. There are three types of enhanced suppliers: Bronze, supplier has agreed the terms and conditions and now has access to the Supplier Portal; Silver, as Bronze and the supplier has provided content; Gold, as silver and the supplier has some form of back office integration.

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## 2.3.3.2 Registering New Suppliers

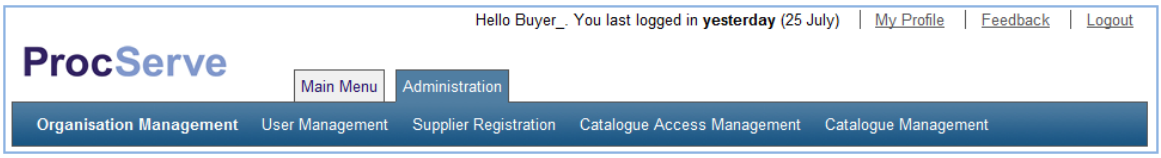
### Overview

Dependant on your role, you can invite and add new suppliers for yours and on behalf of other organisations using Supplier Registration.

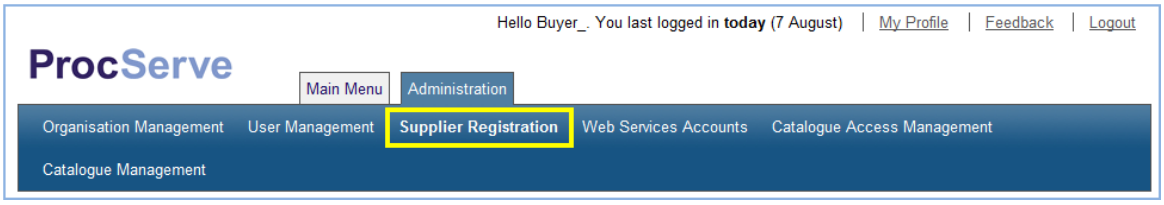
**Note:** Dependant on your community and organisation setup some of the screens and steps may appear differently.

### To add a new Supplier to the marketplace

**1. Click on the 'Administration' tab**

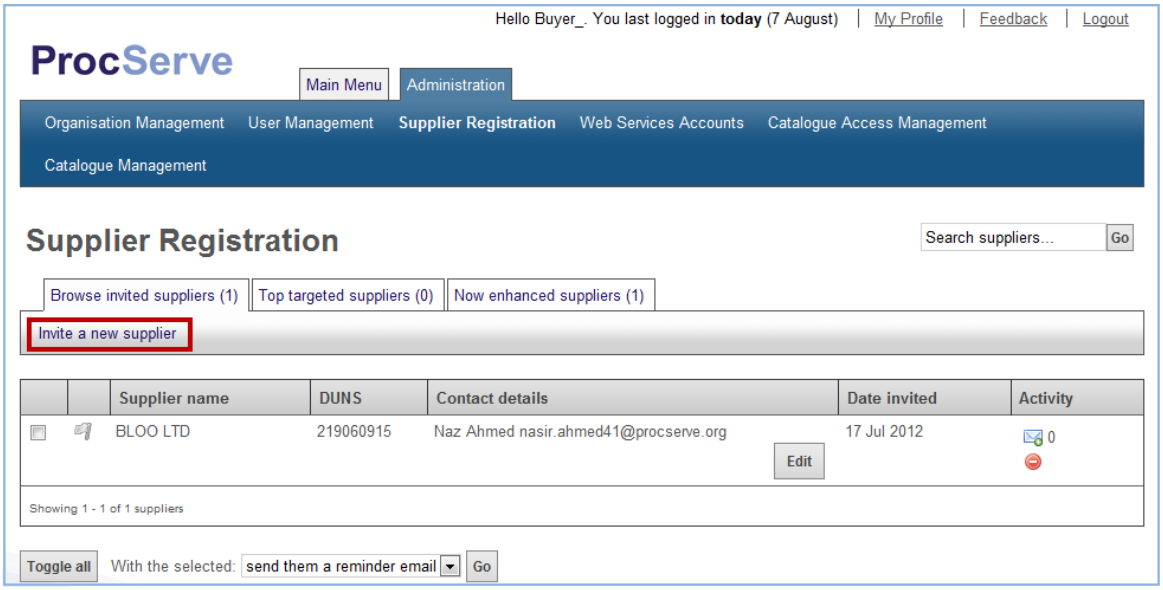



**2. Click 'Supplier Registration'**




From here you will see all suppliers that you have invited and are currently in the registration process.

**3. Click 'Invite a new supplier'**




**NOTE: Steps 4 and 5 only apply for the Community Administrator.**

**4. Search for the buying organisation you wish to register the supplier for.**

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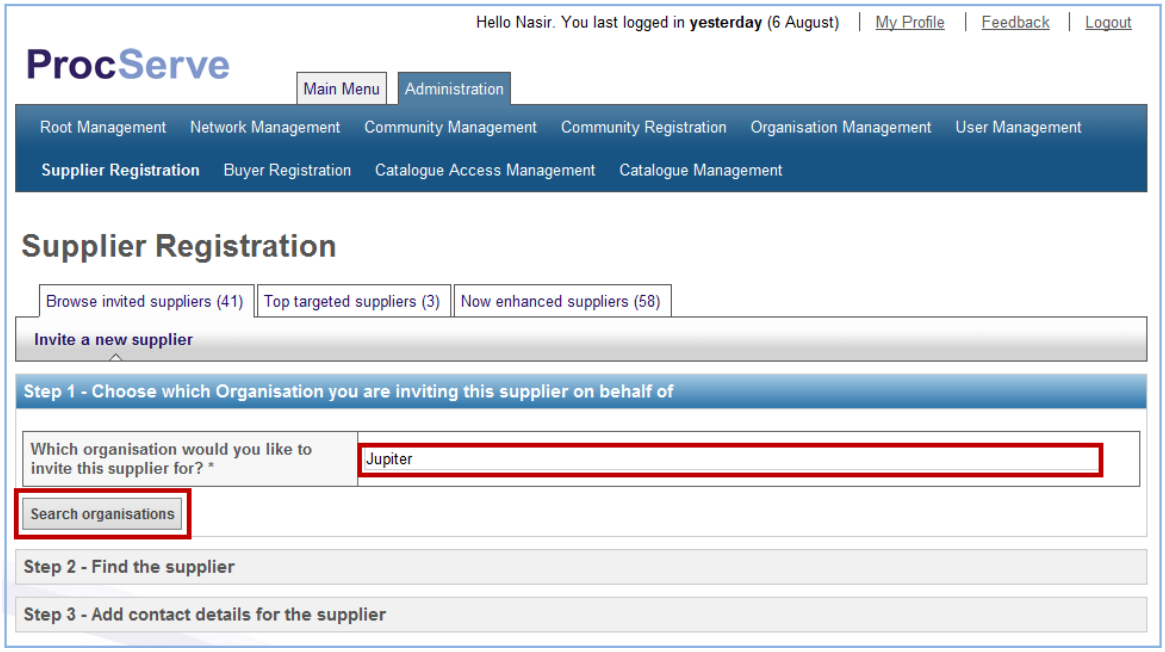
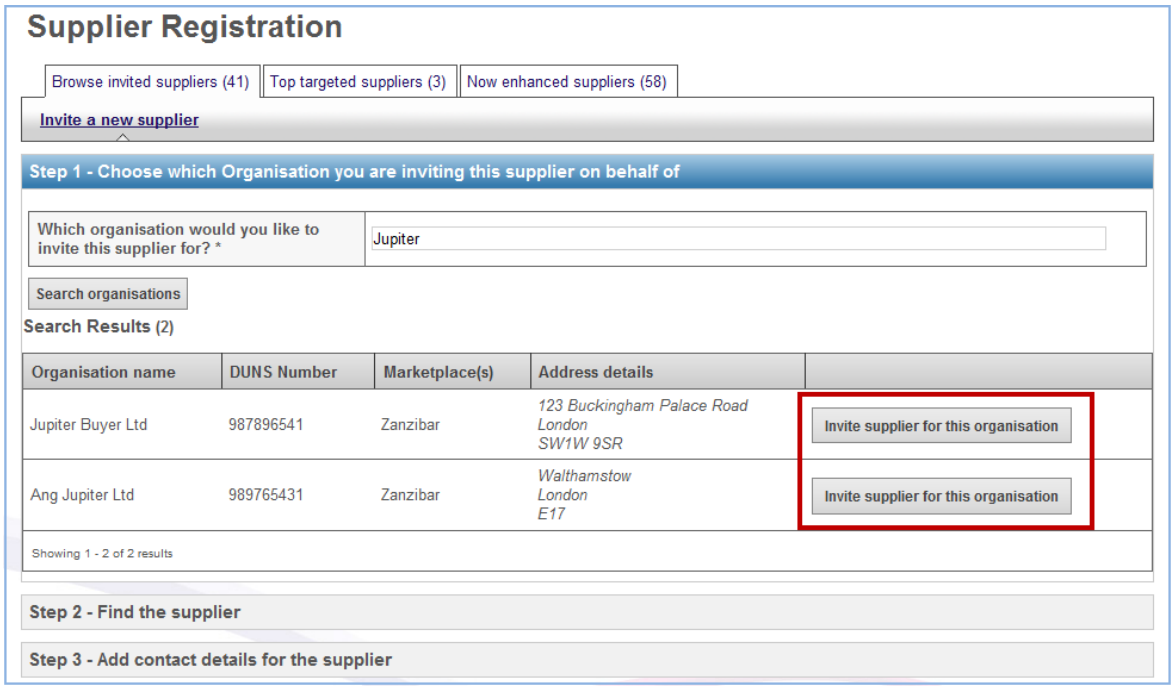

Hello Nasir. You last logged in yesterday (6 August) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Root Management
Network Management
Community Management
Community Registration
Organisation Management
User Management
Supplier Registration
Buyer Registration
Catalogue Access Management
Catalogue Management
Supplier Registration
Browse invited suppliers (41)
Top targeted suppliers (3)
Now enhanced suppliers (58)
Invite a new supplier
Step 1 - Choose which Organisation you are inviting this supplier on behalf of
Which organisation would you like to invite this supplier for? *
Jupiter
Search organisations
Step 2 - Find the supplier
Step 3 - Add contact details for the supplier

**5. Choose the buying organisation you are inviting the supplier on behalf of and click 'Invite supplier for this organisation'**




**6. Fill in the web form to search for the details of the supplier**

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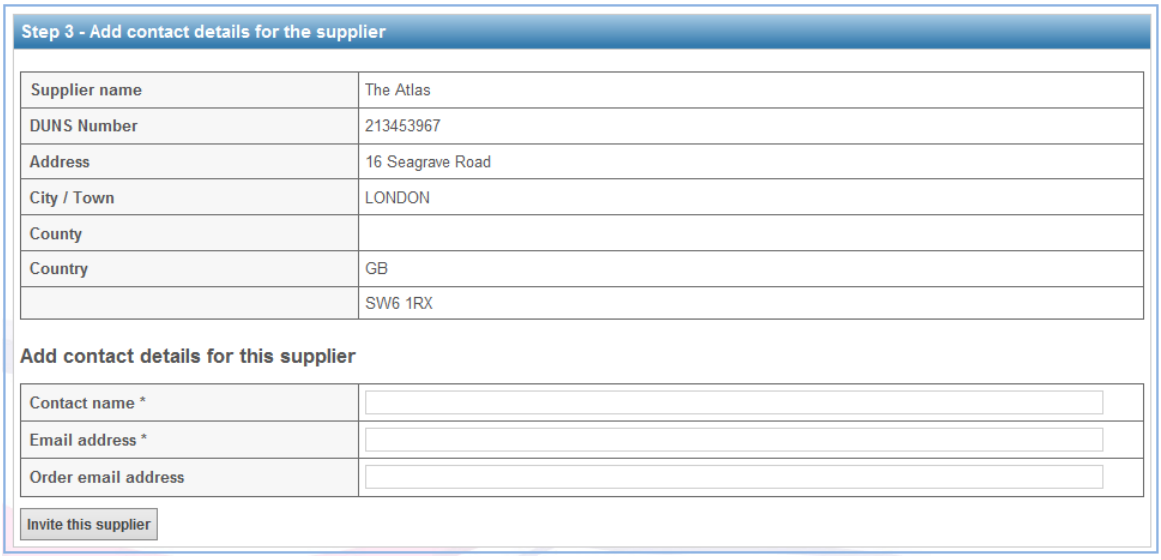
**7. When complete click 'Find this supplier'**

Your results will be shown at the bottom of the page.

**8. Click 'Invite this supplier' to select your chosen supplier**

**9. Add the contact details for the supplier and click 'Invite this supplier'**




You should then get a success message.

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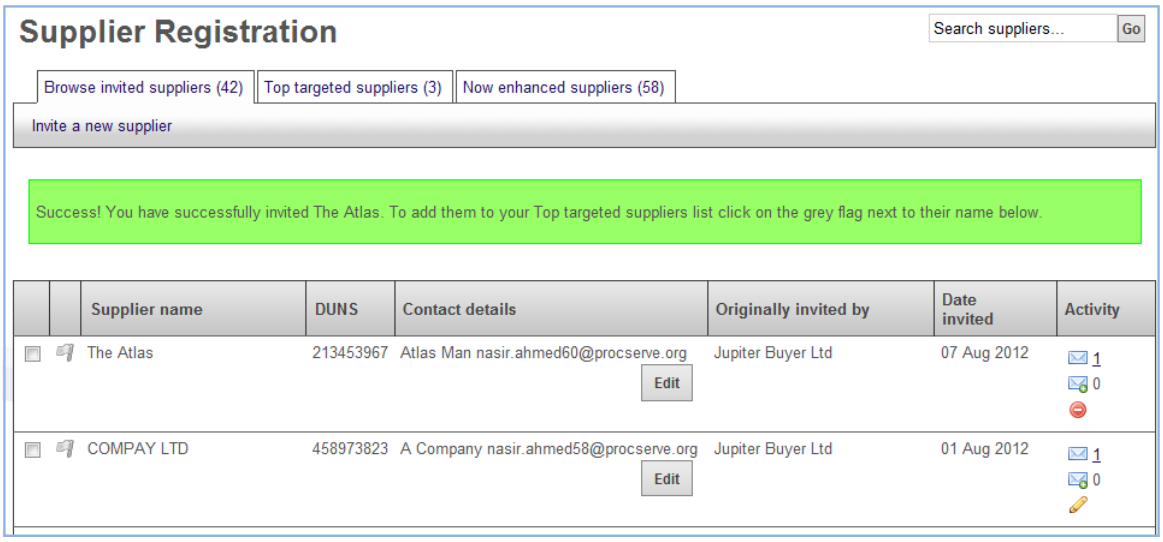


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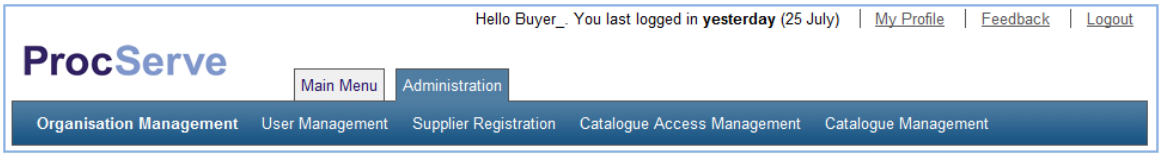
## 2.3.3.3 Reminding Suppliers to Join

### Overview

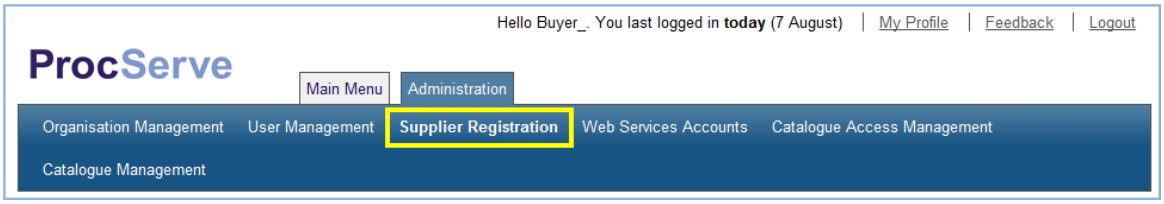
Once a supplier has been invited to join the Procserve Trading Network you can remind them to complete their registration.

### Sending reminders to suppliers

**1. Click on the 'Administration' tab**




**2. Click 'Supplier Registration'**




From here you will see all suppliers that you have invited and are currently in the registration process.

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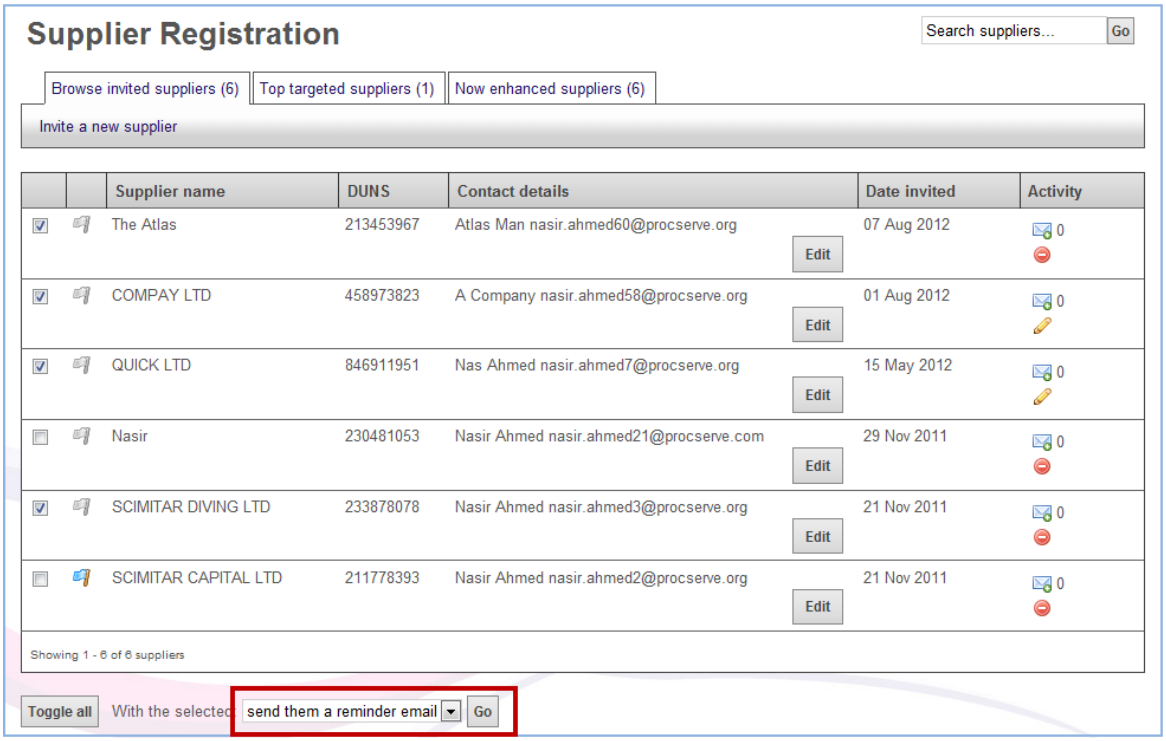
**Tip!** To focus your supplier adoption - use the top targeted tab and invite suppliers from there as a priority.

**3. Tick the box next the supplier you wish to remind and then at the footer of the page click 'Go'**

**Tip!** More than one supplier can be reminded at a time by selecting multiple boxes.




You will then be presented with the email wizard for sending a reminder email.

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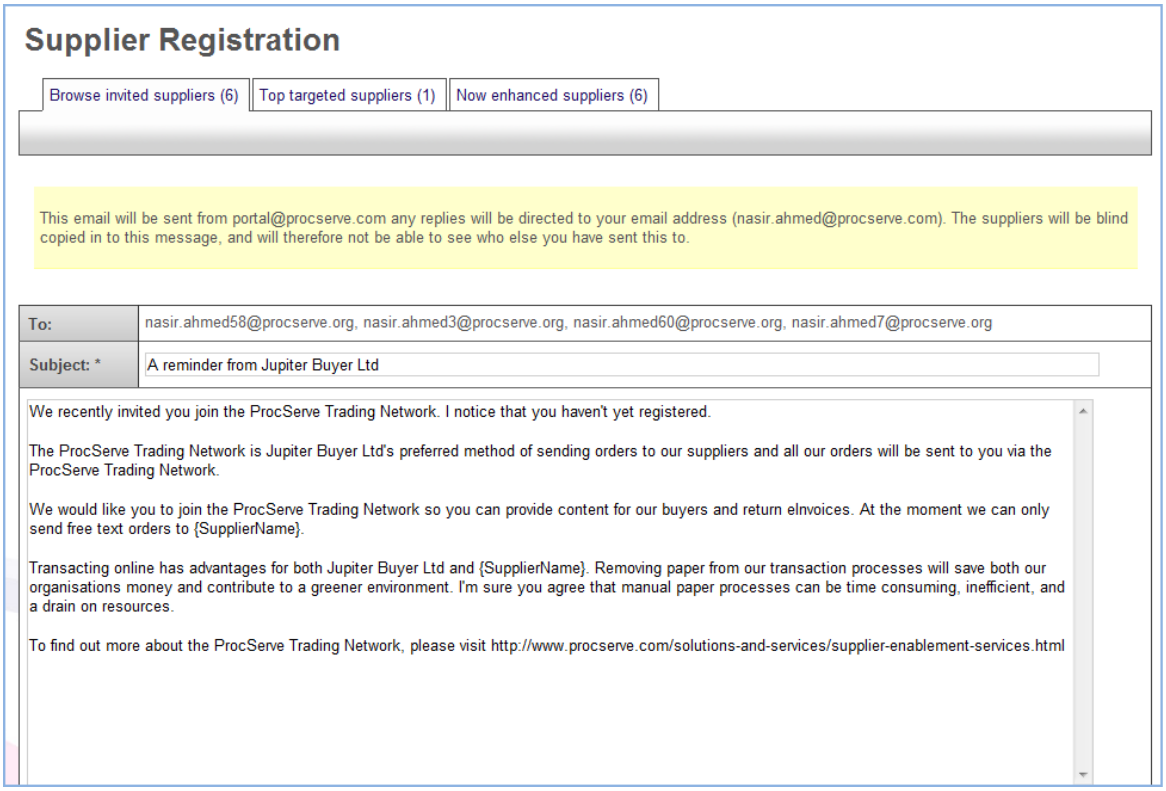
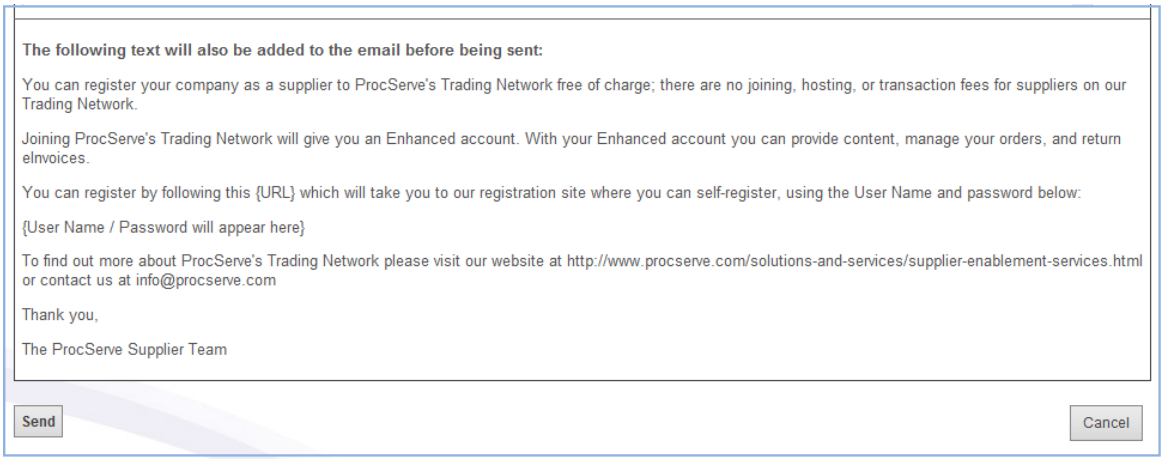

Supplier Registration
Browse invited suppliers (6)
Top targeted suppliers (1)
Now enhanced suppliers (6)
This email will be sent from portal@procserve.com any replies will be directed to your email address (nasir.ahmed@procserve.com). The suppliers will be blind copied in to this message, and will therefore not be able to see who else you have sent this to.
To:
nasir.ahmed58@procserve.org, nasir.ahmed3@procserve.org, nasir.ahmed60@procserve.org, nasir.ahmed7@procserve.org
Subject: *
A reminder from Jupiter Buyer Ltd
We recently invited you join the ProcServe Trading Network. I notice that you haven't yet registered.
The ProcServe Trading Network is Jupiter Buyer Ltd's preferred method of sending orders to our suppliers and all our orders will be sent to you via the ProcServe Trading Network.
We would like you to join the ProcServe Trading Network so you can provide content for our buyers and return eInvoices. At the moment we can only send free text orders to {SupplierName}.
Transacting online has advantages for both Jupiter Buyer Ltd and {SupplierName}. Removing paper from our transaction processes will save both our organisations money and contribute to a greener environment. I'm sure you agree that manual paper processes can be time consuming, inefficient, and a drain on resources.
To find out more about the ProcServe Trading Network, please visit http://www.procserve.com/solutions-and-services/supplier-enablement-services.html

**Note:** You can change some of the text in the reminder email but the second half remains static as this contains the important registration details.

**4. When satisfied with the email click 'Send' at the footer of the page.**


The following text will also be added to the email before being sent:
You can register your company as a supplier to ProcServe's Trading Network free of charge; there are no joining, hosting, or transaction fees for suppliers on our Trading Network.
Joining ProcServe's Trading Network will give you an Enhanced account. With your Enhanced account you can provide content, manage your orders, and return eInvoices.
You can register by following this {URL} which will take you to our registration site where you can self-register, using the User Name and password below:
{User Name / Password will appear here}
To find out more about ProcServe's Trading Network please visit our website at http://www.procserve.com/solutions-and-services/supplier-enablement-services.html or contact us at info@procserve.com
Thank you,
The ProcServe Supplier Team
Send
Cancel

Once the email has been sent you will get a success message.

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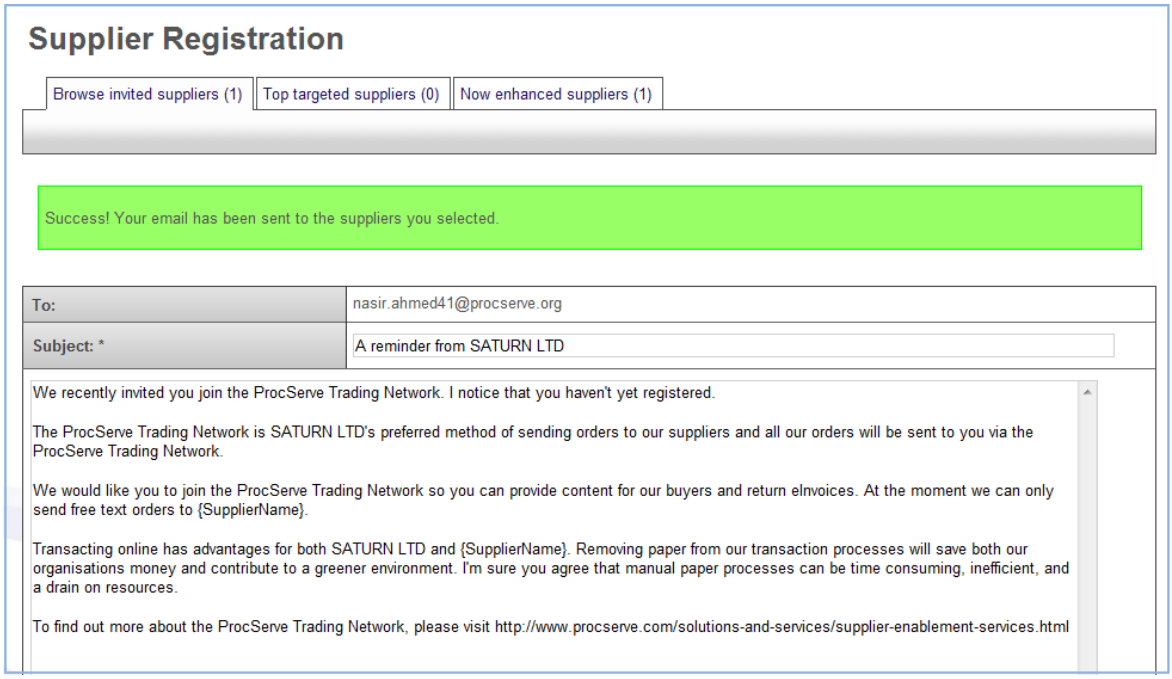
Supplier Registration
Browse invited suppliers (1)
Top targeted suppliers (0)
Now enhanced suppliers (1)
Success! Your email has been sent to the suppliers you selected.
To:
nasir.ahmed41@procserve.org
Subject: *
A reminder from SATURN LTD
We recently invited you join the ProcServe Trading Network. I notice that you haven't yet registered.
The ProcServe Trading Network is SATURN LTD's preferred method of sending orders to our suppliers and all our orders will be sent to you via the ProcServe Trading Network.
We would like you to join the ProcServe Trading Network so you can provide content for our buyers and return eInvoices. At the moment we can only send free text orders to {SupplierName}.
Transacting online has advantages for both SATURN LTD and {SupplierName}. Removing paper from our transaction processes will save both our organisations money and contribute to a greener environment. I'm sure you agree that manual paper processes can be time consuming, inefficient, and a drain on resources.
To find out more about the ProcServe Trading Network, please visit http://www.procserve.com/solutions-and-services/supplier-enablement-services.html

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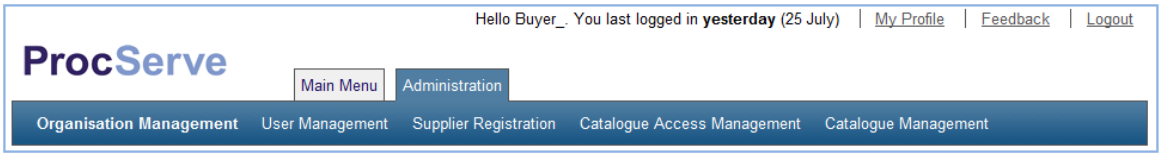
## 2.3.3.4 Targeting your Suppliers

### Overview

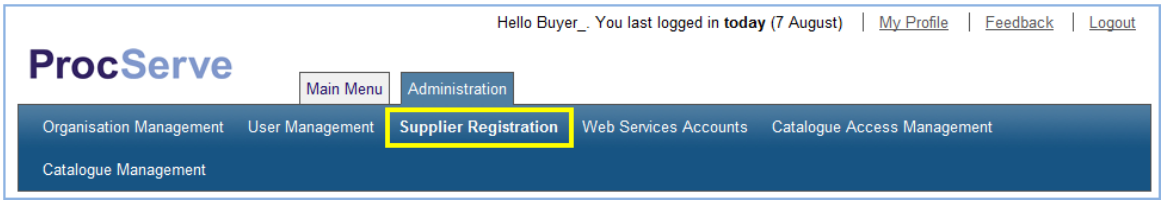
You can target certain suppliers you have invited to join the Procserve Trading Network. You can use this feature to make it easier to send reminder emails and track the status of priority suppliers.

### Viewing your top targeted suppliers

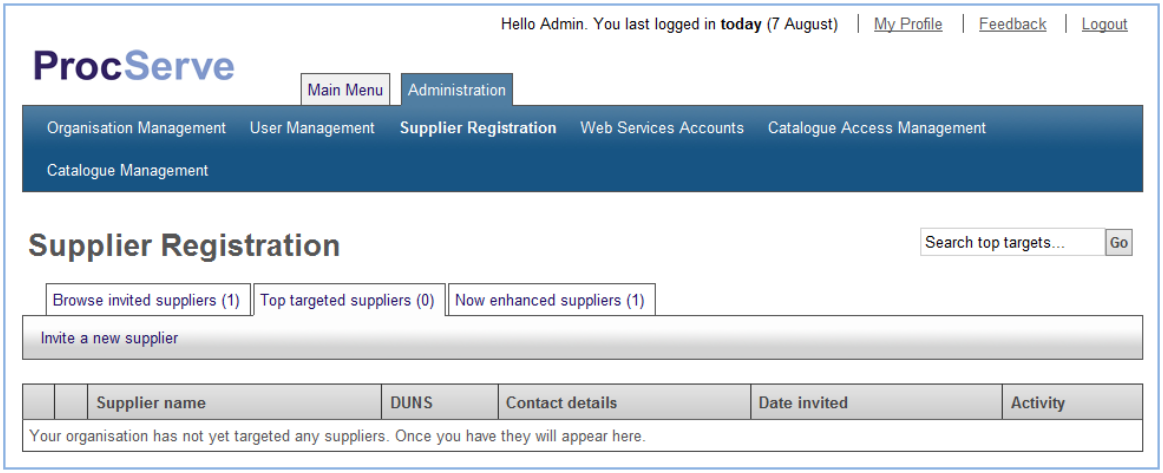
**1. Click on the 'Administration' tab**




**2. Click 'Supplier Registration'**




**3. Click on 'Top targeted suppliers'**




You can view all the suppliers in your top target list.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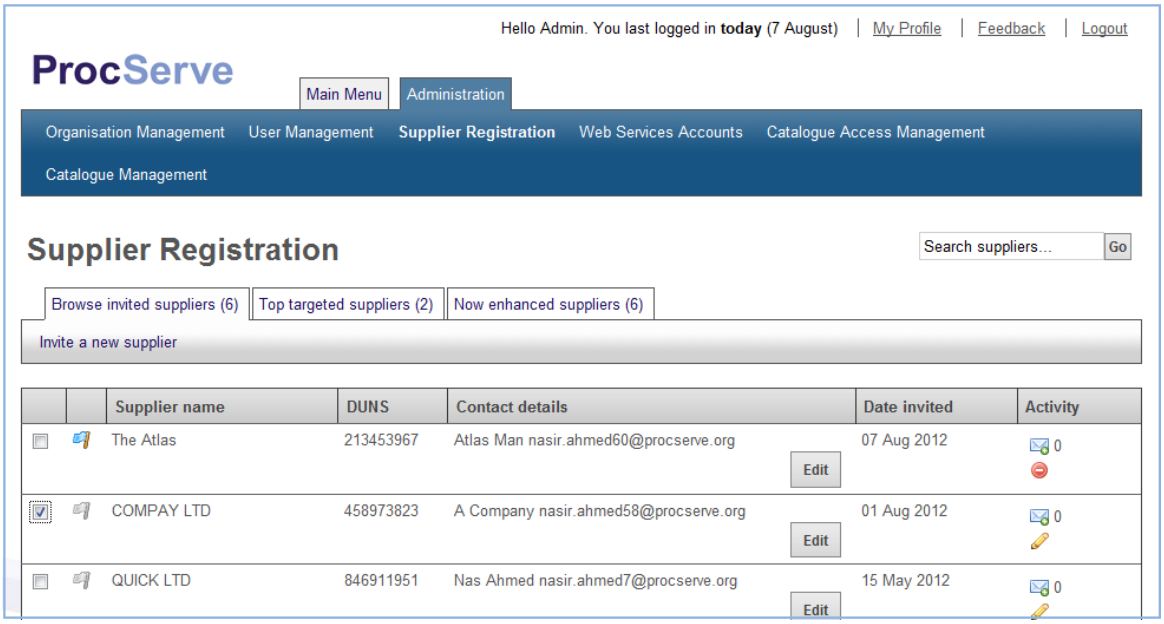
2.3.3.4.1 Adding a new supplier to your top targeted list

**Overview**

You can dynamically add and remove suppliers from your 'Top targeted suppliers' tab.

**1. Search for the supplier in 'Browse invited suppliers'**

**2. Select the organisation you wish to add to the 'Top targeted suppliers' tab by clicking the flag.**




Your 'Top targeted suppliers' tab will now be updated with the number of suppliers targeted.

**Tip!** You can remove suppliers from the top targeted list by clicking the flag.

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## 2.3.4 Managing your Users

### 2.3.4.1 Introduction to User Management

**Overview**

You can add, edit and deactivate users within your organisation in 'User Management'.

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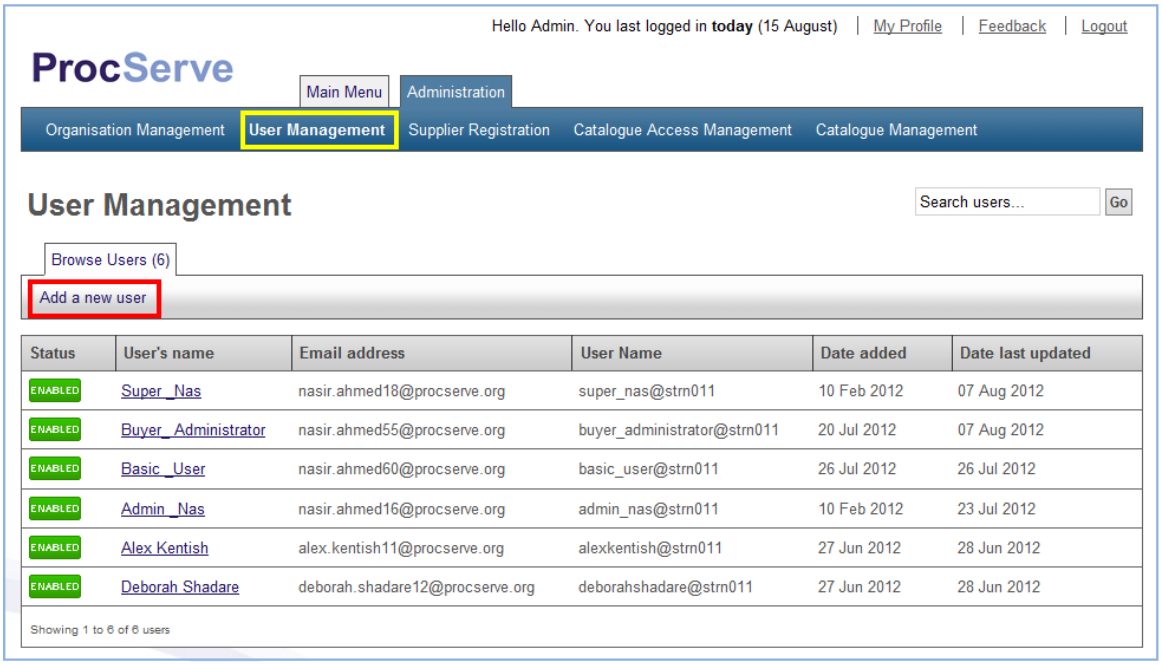
### 2.3.4.2 Add a New User

**To add a New User to your Organisation.**

**1. Log on to PCH as administrator.**

**2. At home page select Administration menu, then select 'User Management'.**

**3. Click on 'Add a new user'.**




**4. Complete the form, from dropdown menu select the appropriate role for the user and click on 'Add this user' button**

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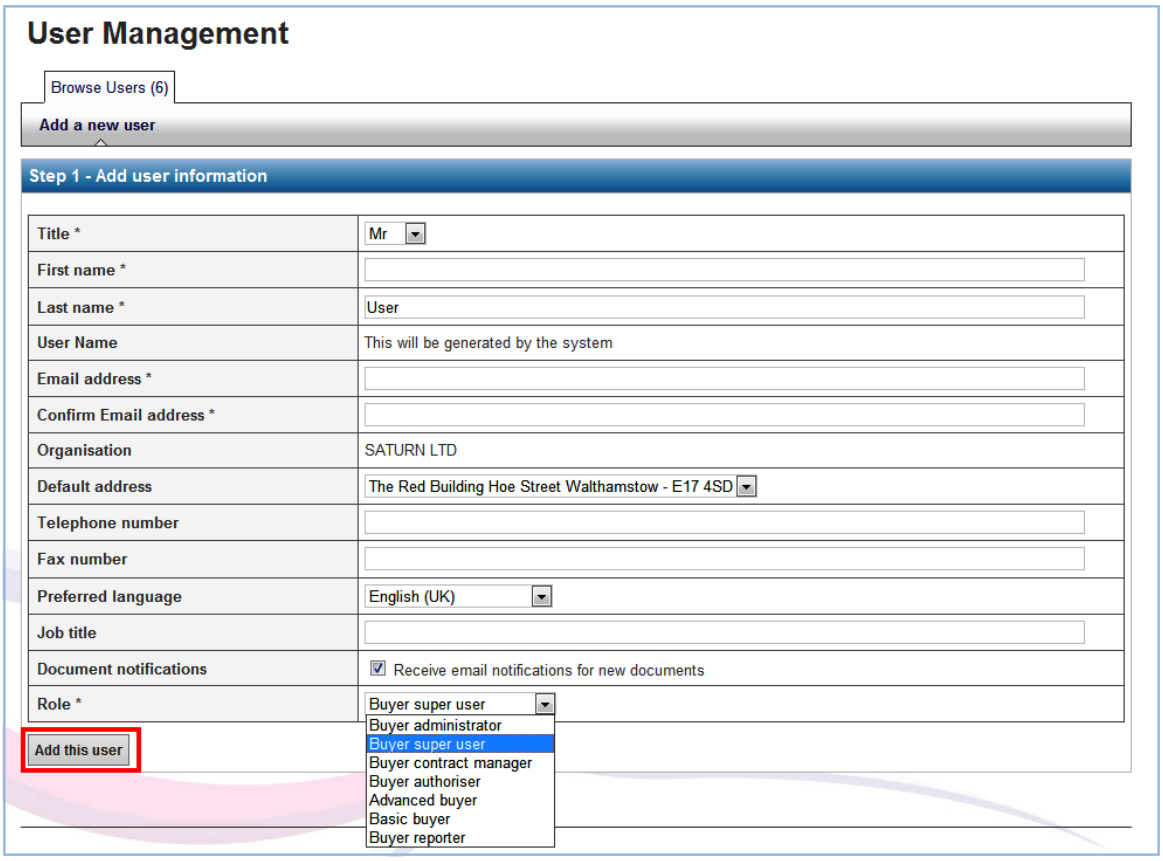


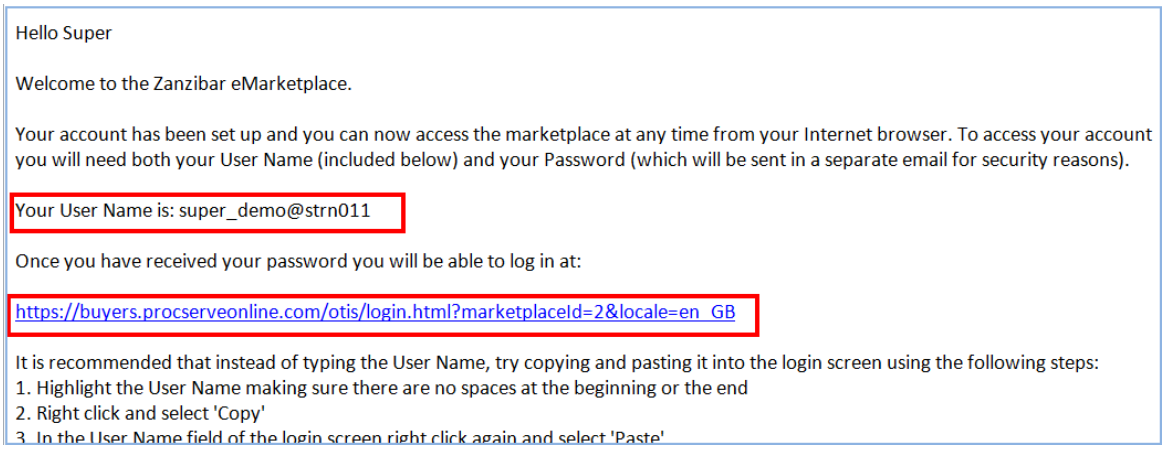

Upon completing the form and clicking on the 'Add this user' button, you will receive two emails, one containing username and second containing a temporary password.

**Note: The temporary password is one time use only, you will be asked to change the temporary password as you login for the first time.**

**TIP: Copy and paste your username password from your emails instead of typing in manually.**

**Below are examples of one of two email the user receives.**

Email with username


Hello Super
Welcome to the Zanzibar eMarketplace.
Your account has been set up and you can now access the marketplace at any time from your Internet browser. To access your account you will need both your User Name (included below) and your Password (which will be sent in a separate email for security reasons).
Your User Name is: super_demo@strn011
Once you have received your password you will be able to log in at:
https://buyers.procserveonline.com/otis/login.html?marketplaceId=2&locale=en_GB
It is recommended that instead of typing the User Name, try copying and pasting it into the login screen using the following steps:
1. Highlight the User Name making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'
3. In the User Name field of the login screen right click again and select 'Paste'

Email with password

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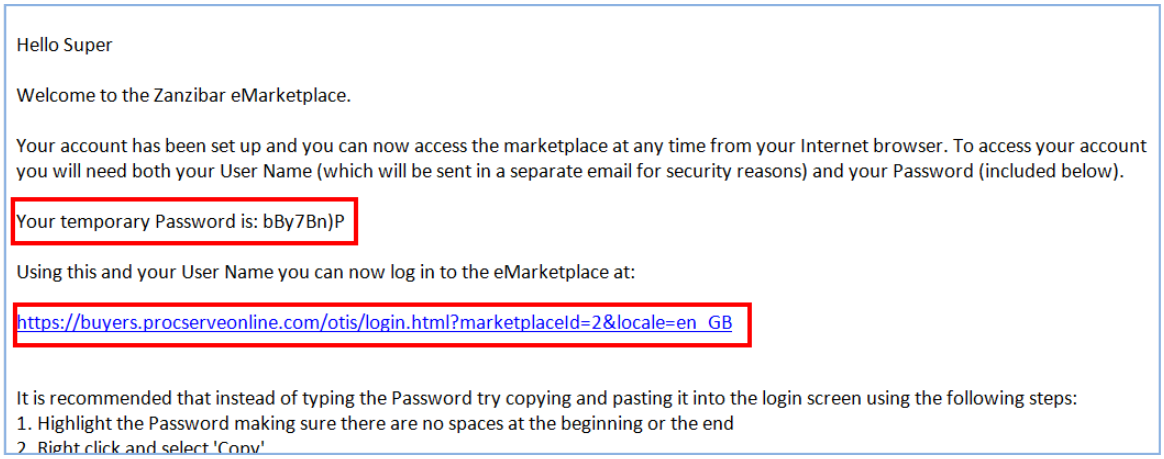

Hello Super

Welcome to the Zanzibar eMarketplace.

Your account has been set up and you can now access the marketplace at any time from your Internet browser. To access your account you will need both your User Name (which will be sent in a separate email for security reasons) and your Password (included below).

Your temporary Password is: bBy7Bn)P

Using this and your User Name you can now log in to the eMarketplace at:

https://buyers.procserveonline.com/otis/login.html?marketplaceId=2&locale=en_GB

It is recommended that instead of typing the Password try copying and pasting it into the login screen using the following steps:
1. Highlight the Password making sure there are no spaces at the beginning or the end
2. Right click and select 'Copy'

5. Copy and paste the URL from the email into your browser.

6. At log in screen, copy and paste username and password and click on 'Login' button.

7. You will be asked to change your temporary password to something that you will be able to remember.

8. Also you need to provide a memorable word so if you locked your account you will be asked to provide the memorable word to unlock your account.

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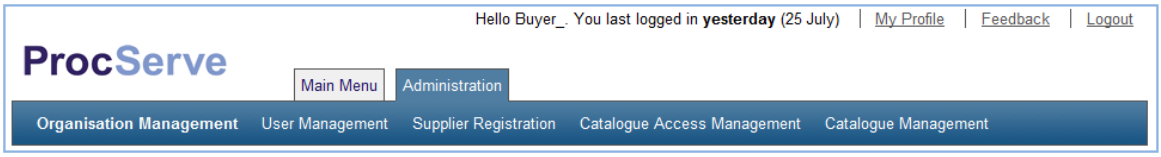
## 2.3.4.3 Editing an Existing User

### Overview

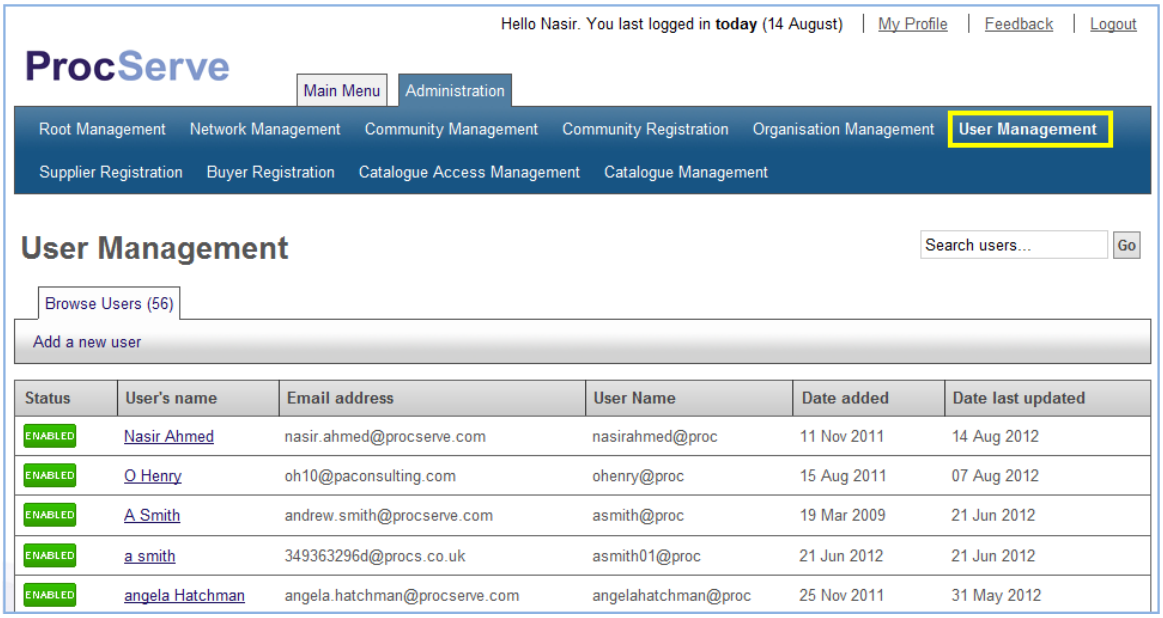
You can edit the basic details of a user in User Management.

### To edit a user

### 1. Click on the 'Administration' tab




### 2. Click on 'User Management' and then the link of the user you wish to add to an organisation




### 3. Click on 'Edit general information'

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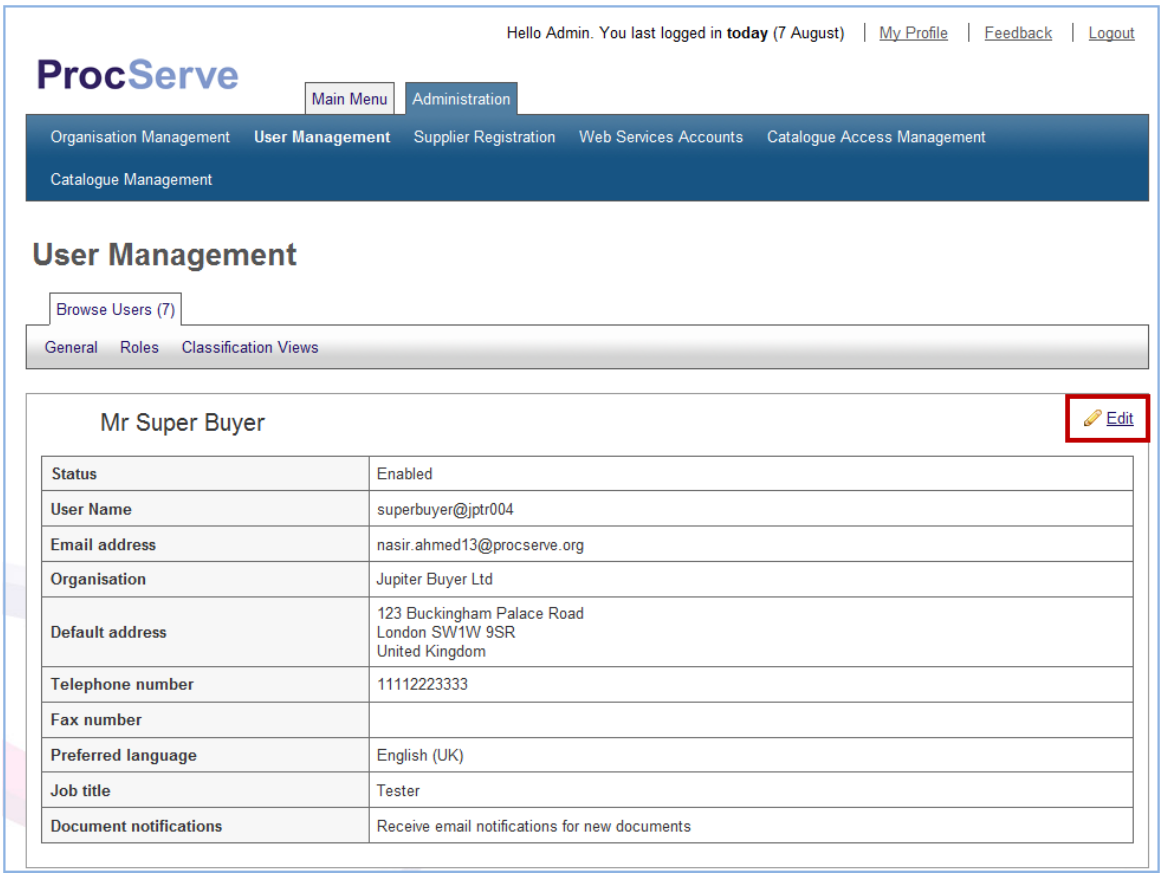


**4. When complete click 'Save' at the footer of the page**

**Note:** You can also edit the roles the user has access to on the 'Roles' button.

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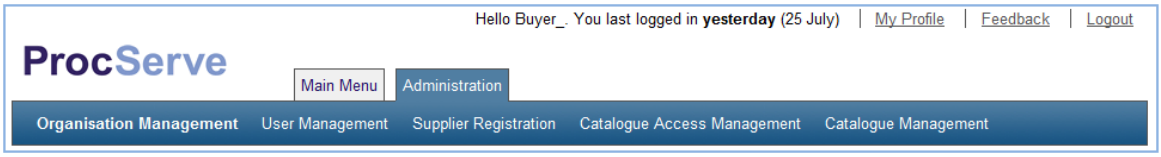
## 2.3.4.4 Editing the Roles a User has in an Organisation

### Overview

At any time you can amend a users role they have within an organisation.

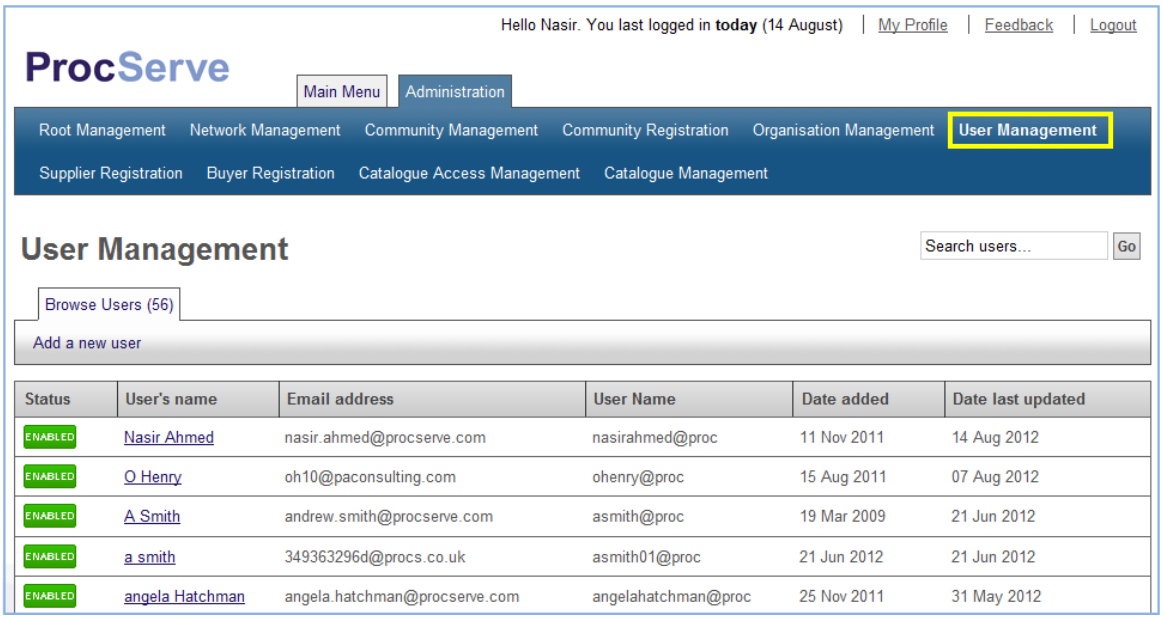
### To edit the roles of a user

**1. Click on the 'Administration' tab**




**2. Click on 'User Management'**

**3. Click on the user you wish to edit the roles for**




**4. Click on 'Roles' to edit their roles in the organisation**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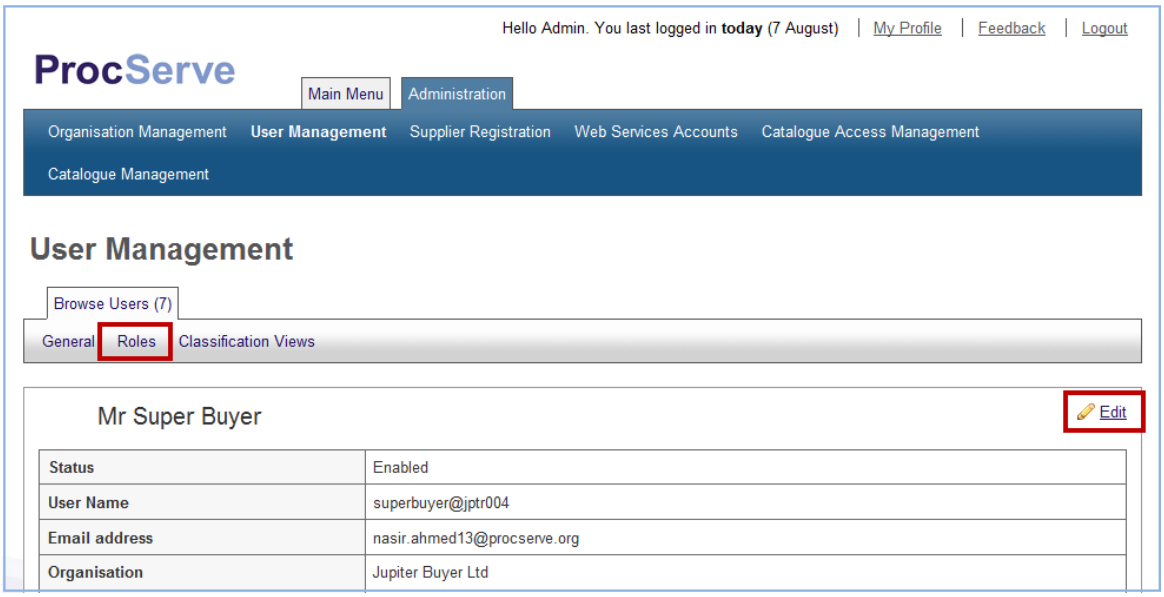


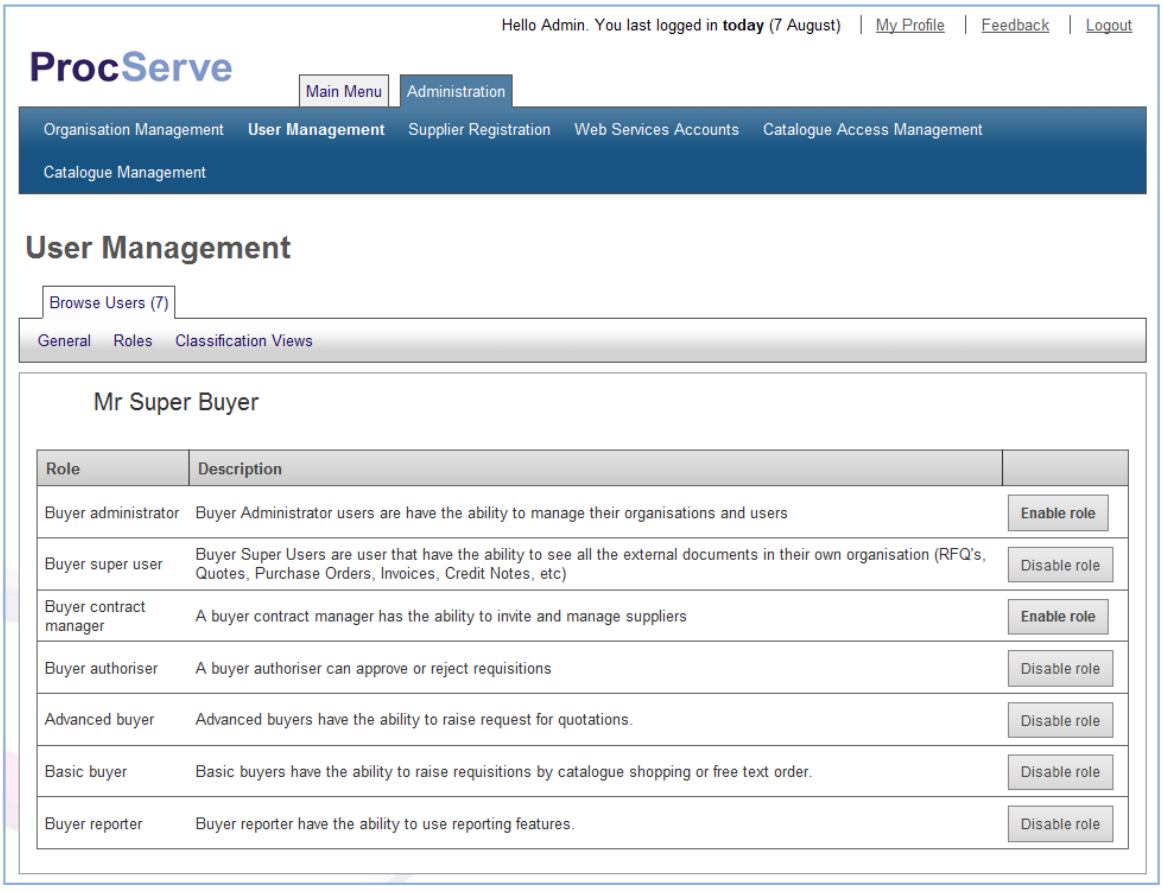
Hello Admin. You last logged in today (7 August) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Organisation Management
User Management
Supplier Registration
Web Services Accounts
Catalogue Access Management
Catalogue Management
User Management
Browse Users (7)
General
Roles
Classification Views
Mr Super Buyer
Role
Description
Buyer administrator
Buyer Administrator users are have the ability to manage their organisations and users
Enable role
Buyer super user
Buyer Super Users are user that have the ability to see all the external documents in their own organisation (RFQ's, Quotes, Purchase Orders, Invoices, Credit Notes, etc)
Disable role
Buyer contract manager
A buyer contract manager has the ability to invite and manage suppliers
Enable role
Buyer authoriser
A buyer authoriser can approve or reject requisitions
Disable role
Advanced buyer
Advanced buyers have the ability to raise request for quotations.
Disable role
Basic buyer
Basic buyers have the ability to raise requisitions by catalogue shopping or free text order.
Disable role
Buyer reporter
Buyer reporter have the ability to use reporting features.
Disable role

**5. Enable and disable roles as required by clicking the 'Enable role' or 'Disable role' button as necessary.You should add the roles of**

**Buyer Administrator plus Buyer Report**

**or**

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**Basic Buyer plus Buyer Reporter.**

**Note:** There is no need to save any changes but the user will have to re-log in for the changes to take effect.

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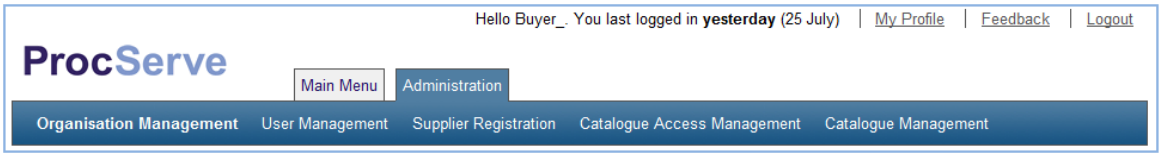
## 2.3.4.5 Deactivating and Activating a User

### Overview

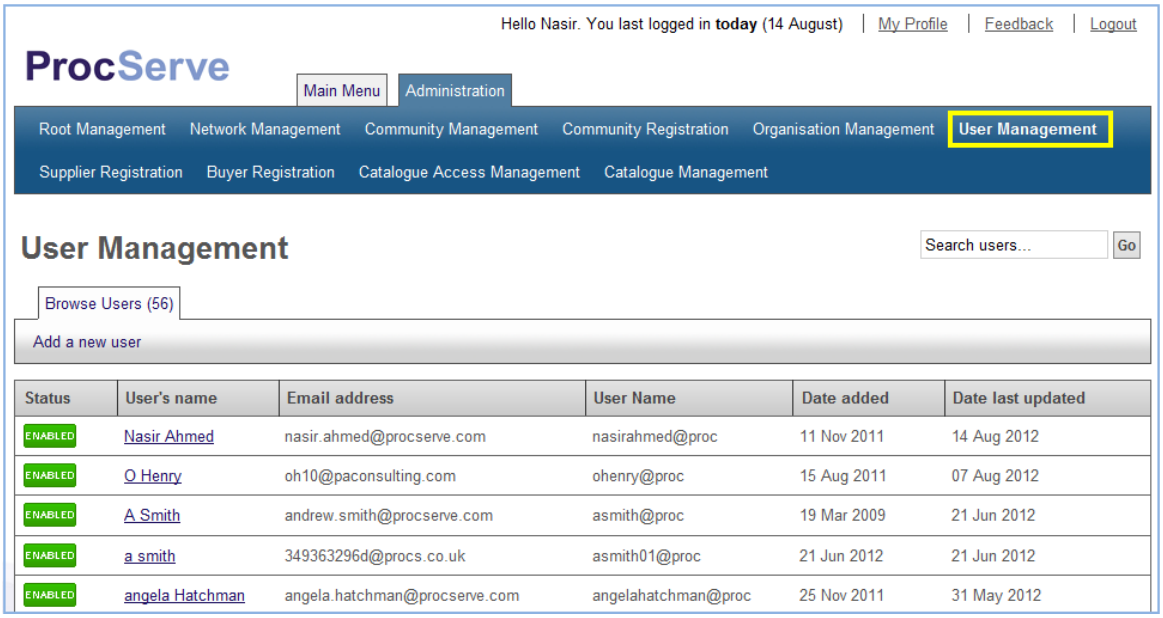
You can deactivate and activate a user in User Management.

### To deactivate/activate a user

**1. Click on the 'Administration' tab**




**2. Click on 'User Management' and then the link of the user you wish to activate/deactivate**




**3. Click on 'Edit general information'**

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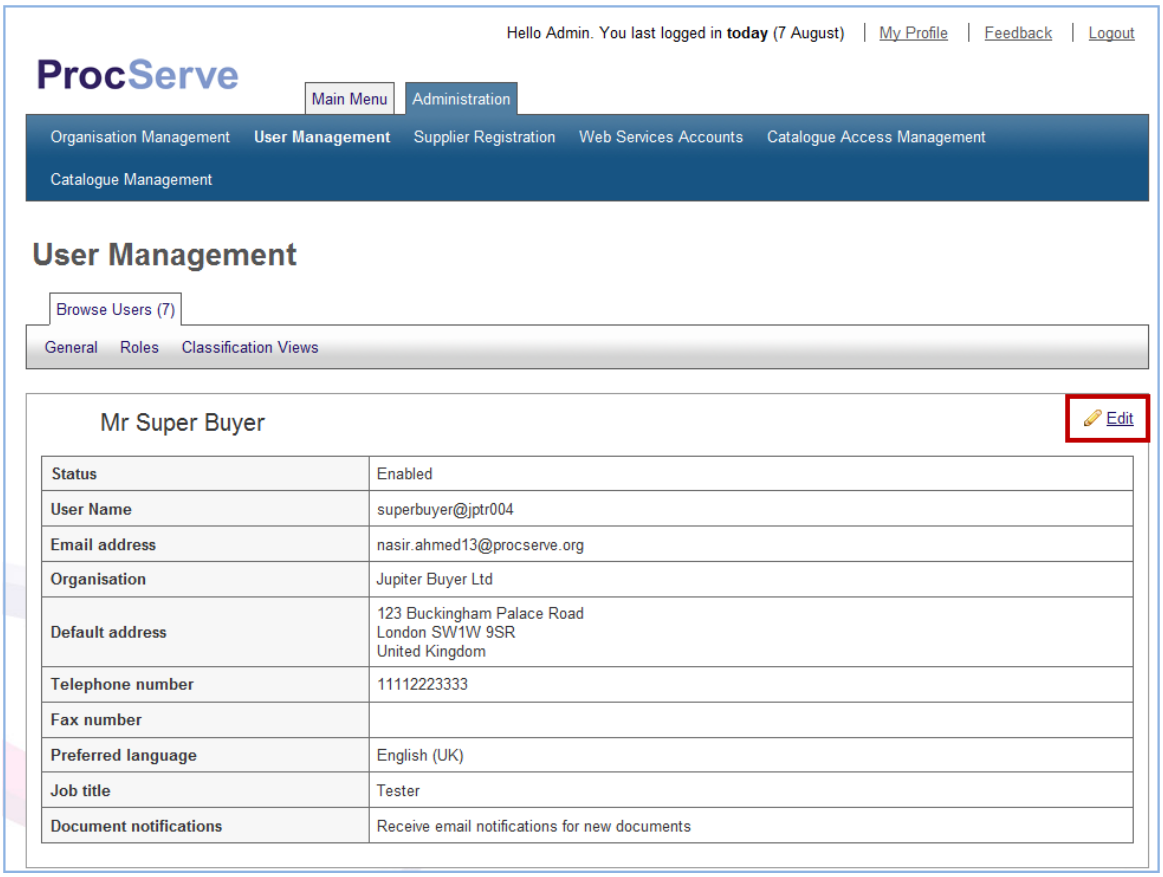
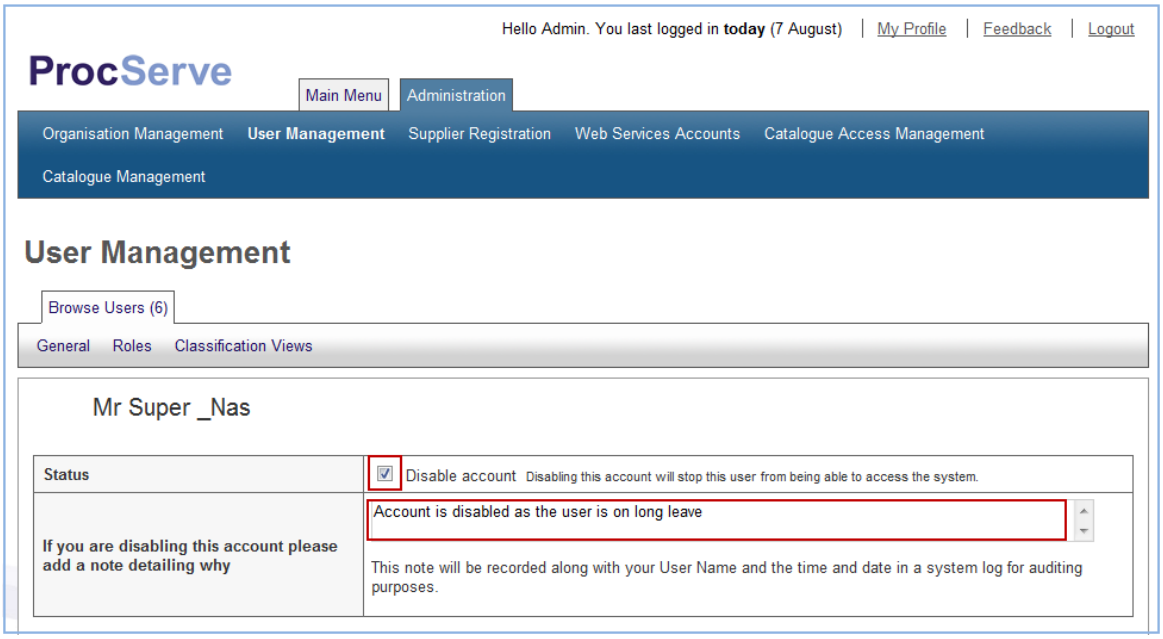



**4. To Disable a user, Tick the box to amend to the require status. Note:** You will have to provide comments in the box to state why this action has been taken for audit purposes.


Hello Admin. You last logged in today (7 August) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Organisation Management
User Management
Supplier Registration
Web Services Accounts
Catalogue Access Management
Catalogue Management
User Management
Browse Users (6)
General
Roles
Classification Views
Mr Super _Nas
Status
Disable account
Disabling this account will stop this user from being able to access the system.
If you are disabling this account please add a note detailing why
Account is disabled as the user is on long leave
This note will be recorded along with your User Name and the time and date in a system log for auditing purposes.

**5. When complete click 'Save' at the footer of the page**

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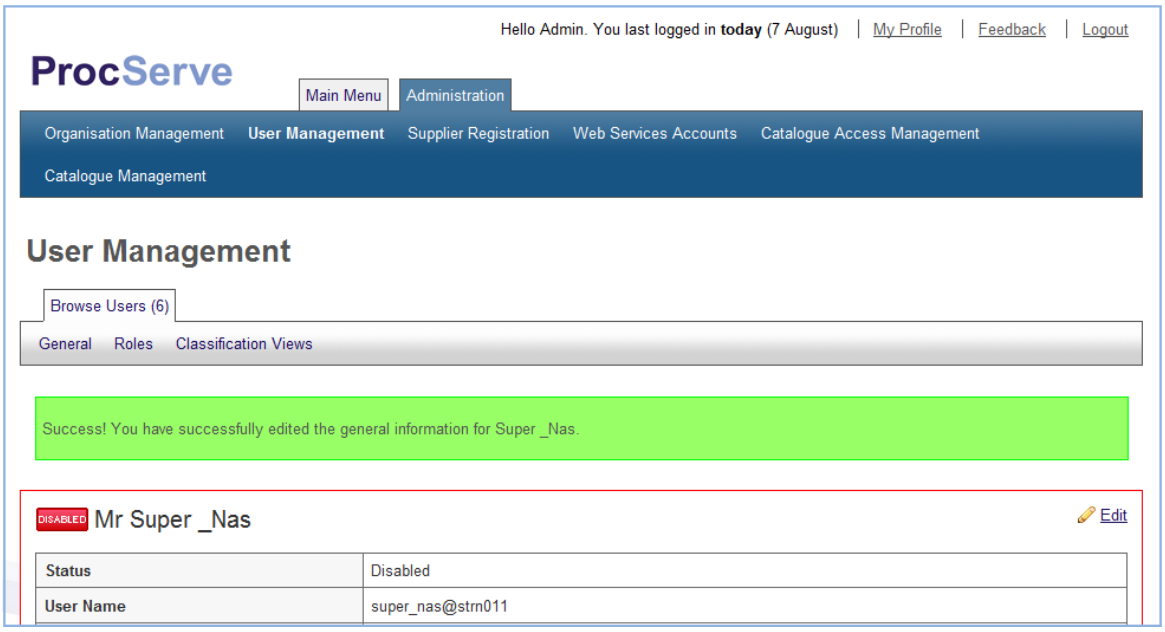
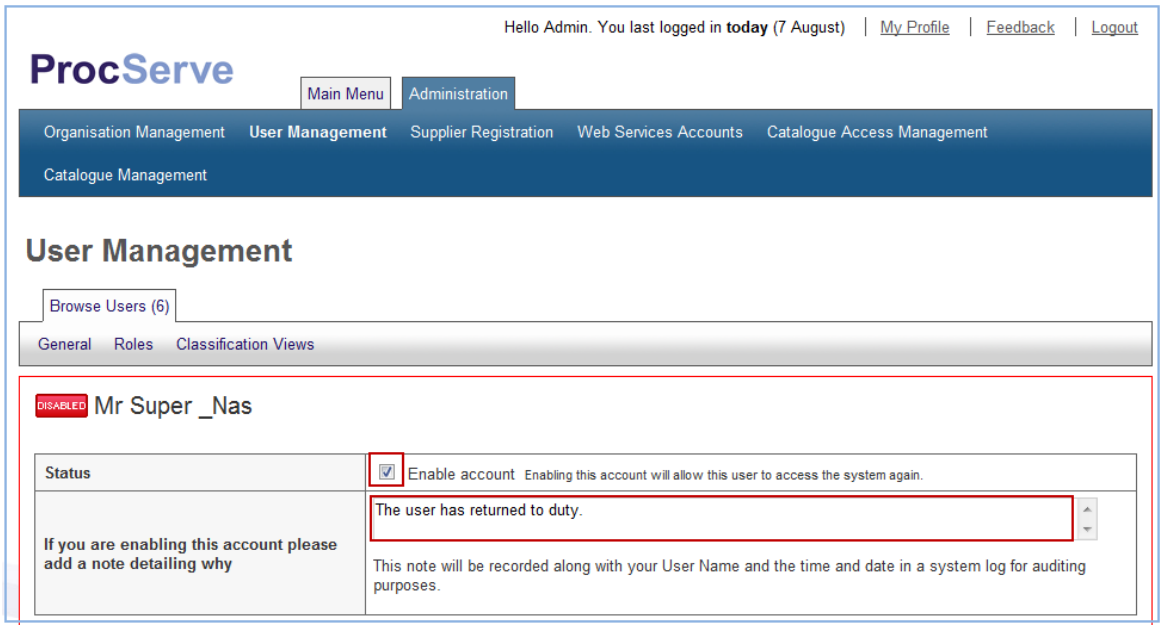



**6. To Enable a user, Tick the box to amend to the require status. Note:** You will have to provide comments in the box to state why this action has been taken for audit purposes.


Hello Admin. You last logged in today (7 August) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Organisation Management
User Management
Supplier Registration
Web Services Accounts
Catalogue Access Management
Catalogue Management
User Management
Browse Users (6)
General
Roles
Classification Views
DISABLED
Mr Super _Nas
Status
Enable account
Enabling this account will allow this user to access the system again.
If you are enabling this account please add a note detailing why
The user has returned to duty.
This note will be recorded along with your User Name and the time and date in a system log for auditing purposes.

**7. When complete click 'Save' at the footer of the page**

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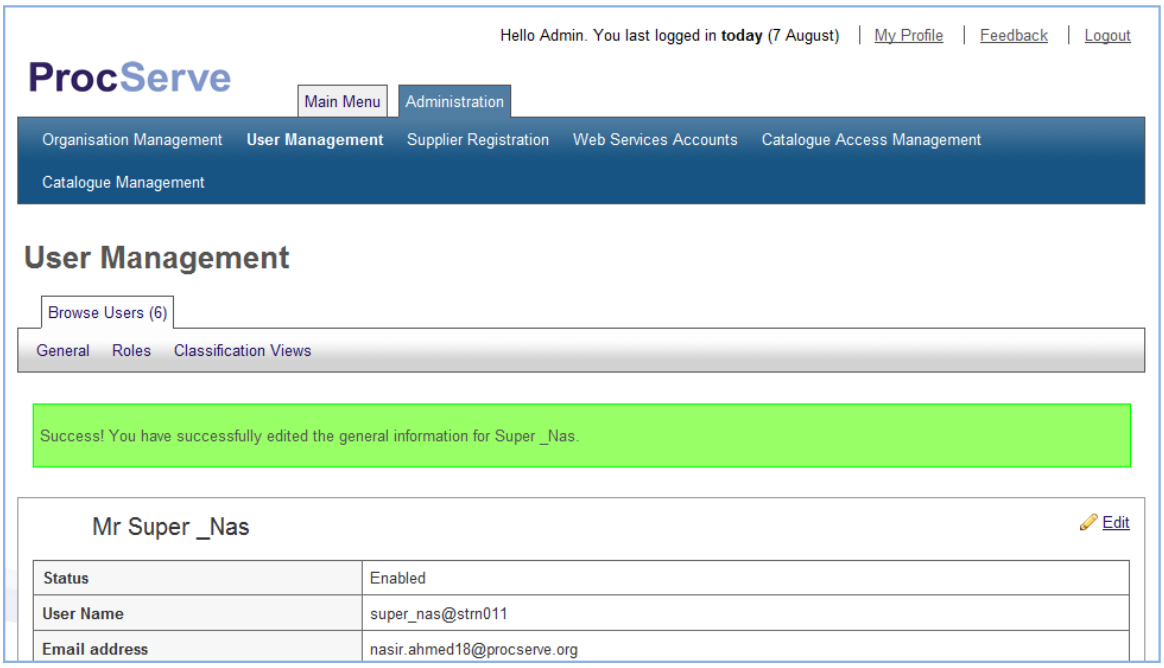


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# 2.3.5 Administering Procserve Commerce Hub

## 2.3.5.1 Managing my Organisation

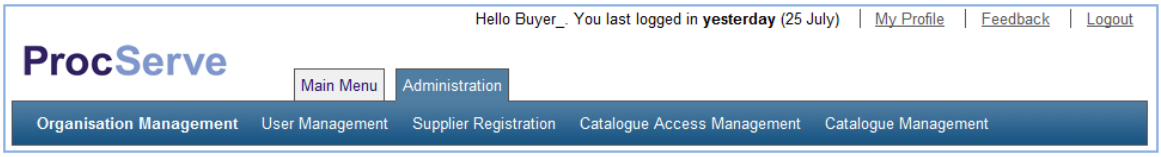
2.3.5.1.1 Editing the Organisation's General Details

### Overview

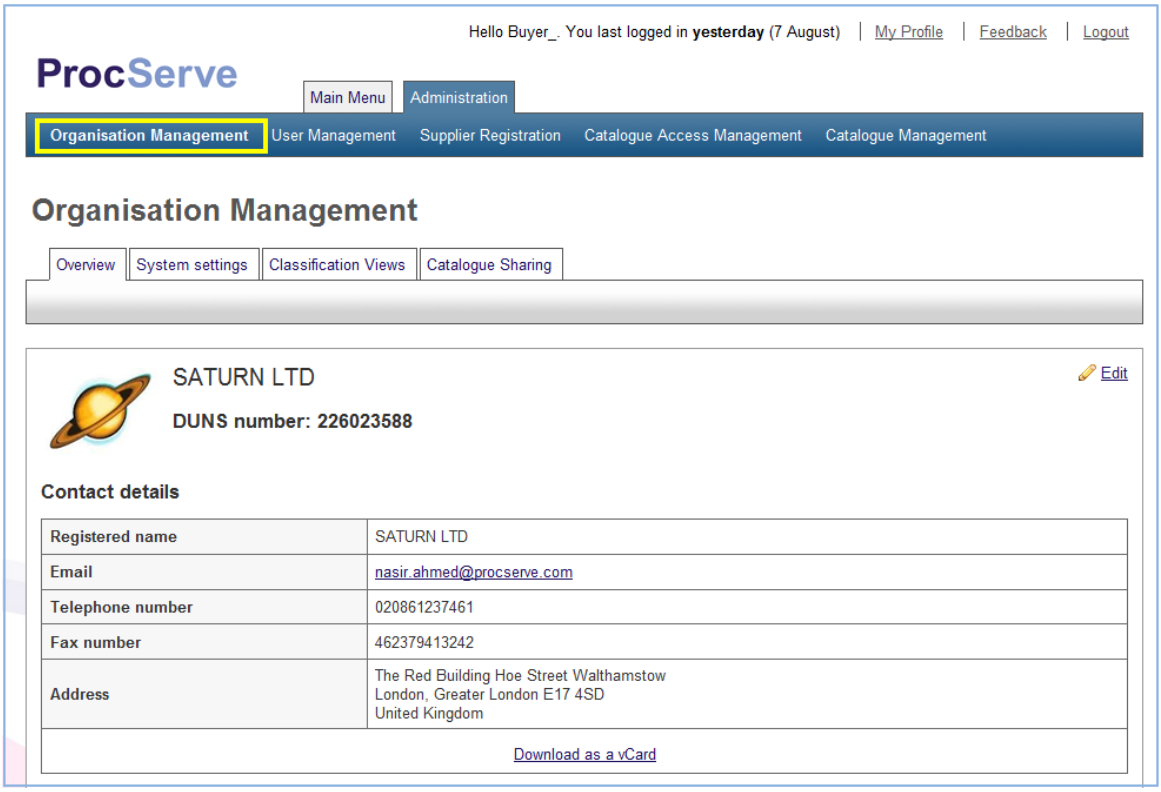
You can view and edit the the general address details of your organisation in 'Organisation Management'.

### Editing your Organisation's overview

**1. Click on the 'Administration' tab**




**2. Click on 'Organisation Management'**




**3. To edit the details click 'Edit'**

**4. Once complete click 'Save Changes'**

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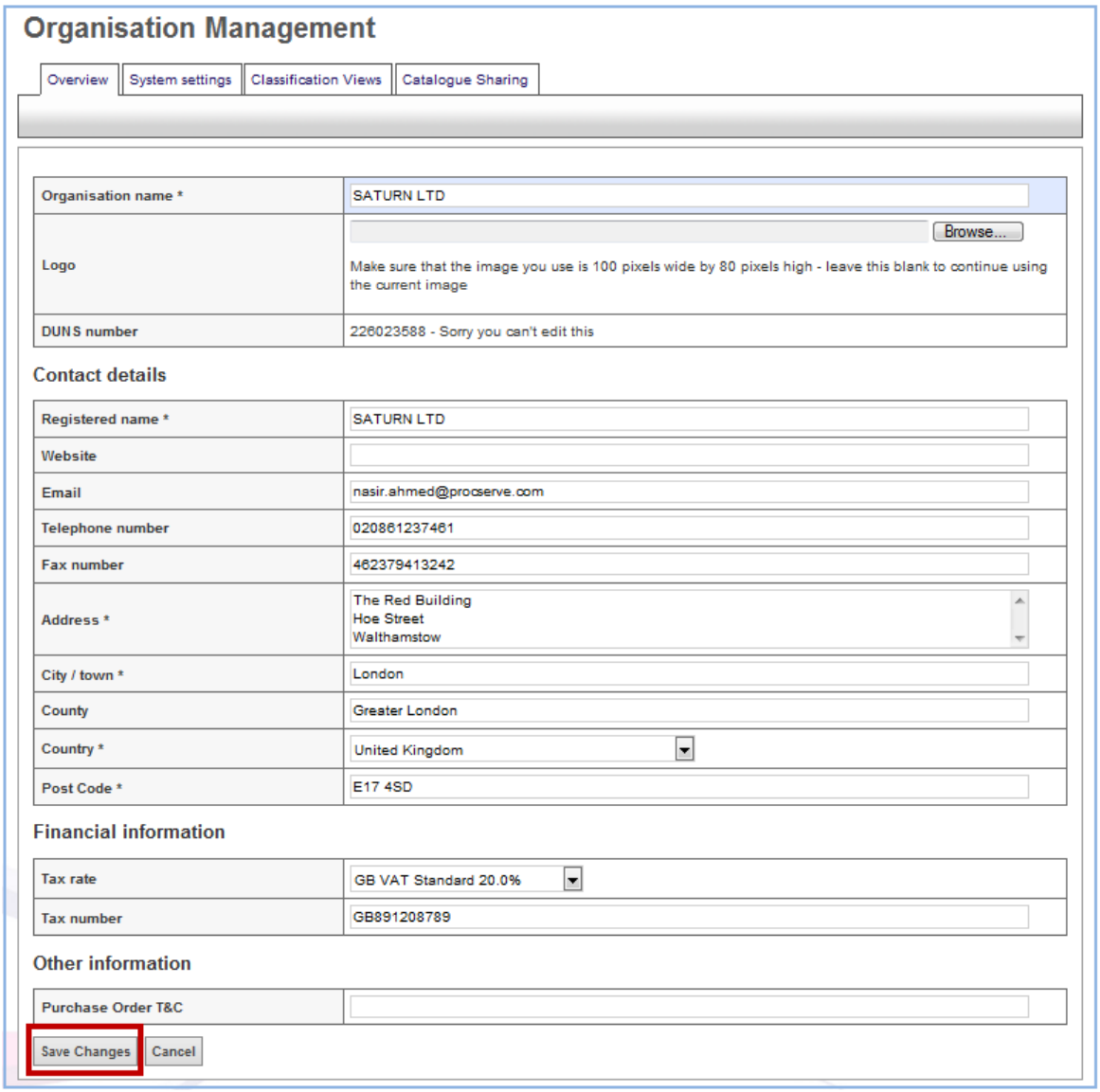


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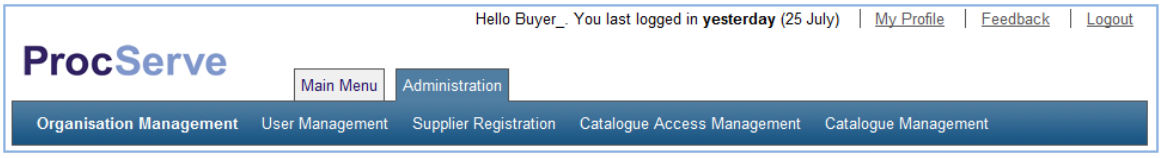
2.3.5.1.2 Editing the Organisation's System Details

### Overview

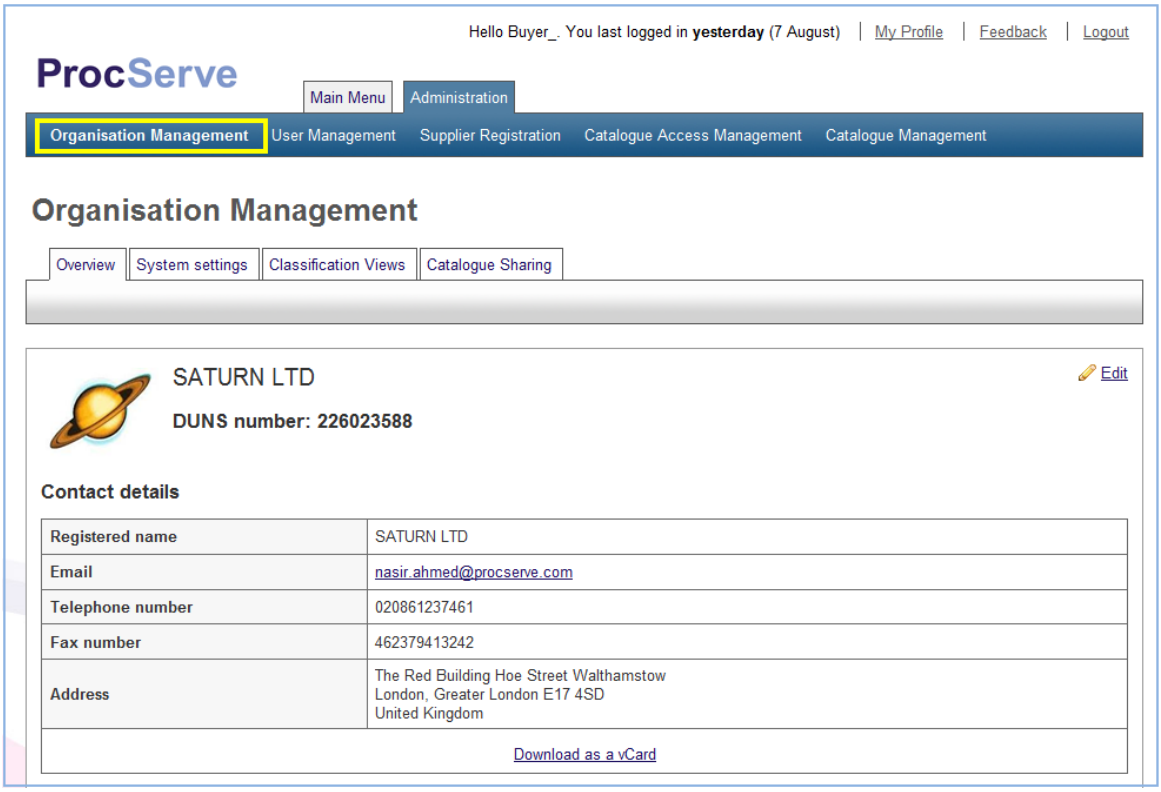
You can edit your organisations system settings in 'Organisation Management' 'System Settings'

### Editing your organisation's system settings

#### 1. Click on the 'Administration' tab




#### 2. Click on 'Organisation Management'




#### 3. Click on 'System Settings'

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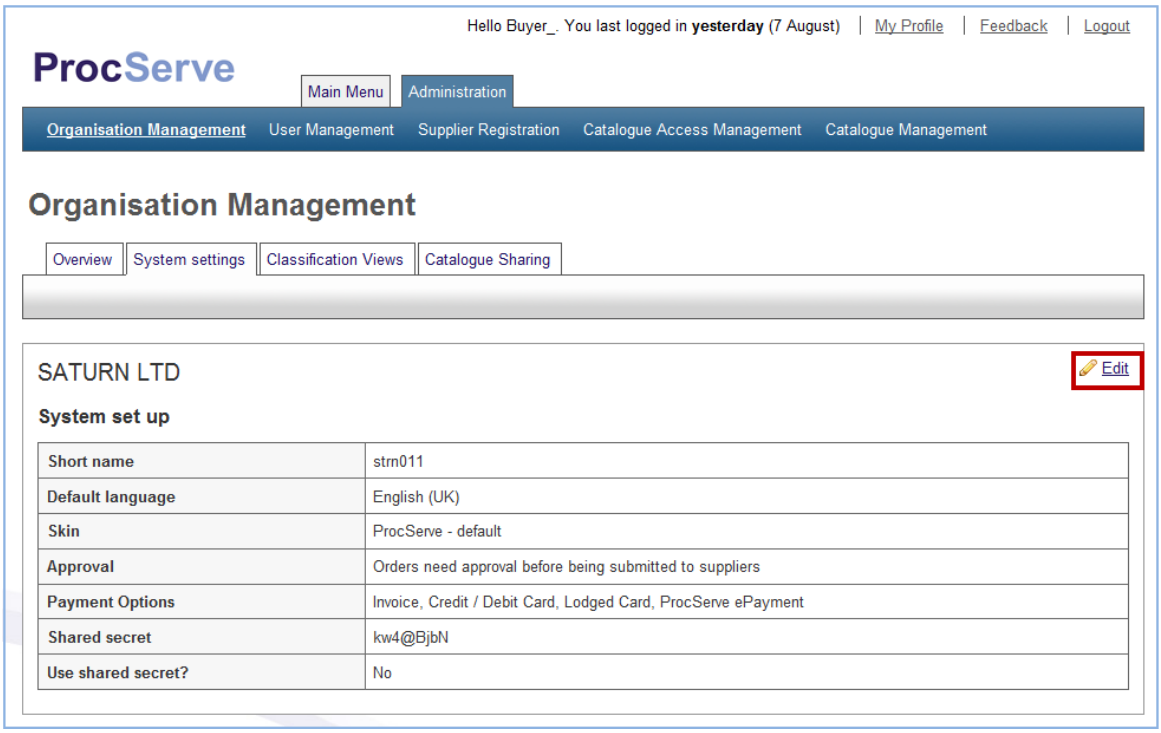
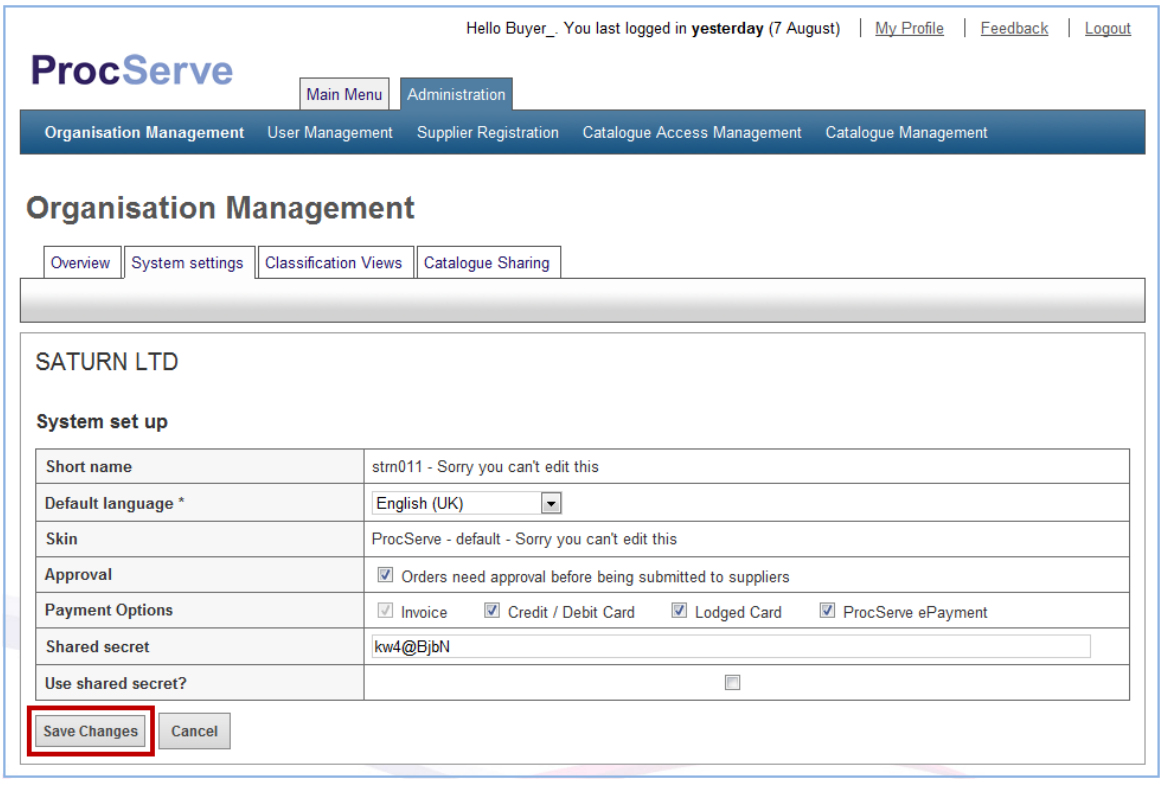



**4. To edit the system settings click 'Edit'**




**5. Once complete, click 'Save Changes'**

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## 2.3.5.2 Managing Classification Views in Procserve Commerce Hub

2.3.5.2.1 Adding a New Classification View

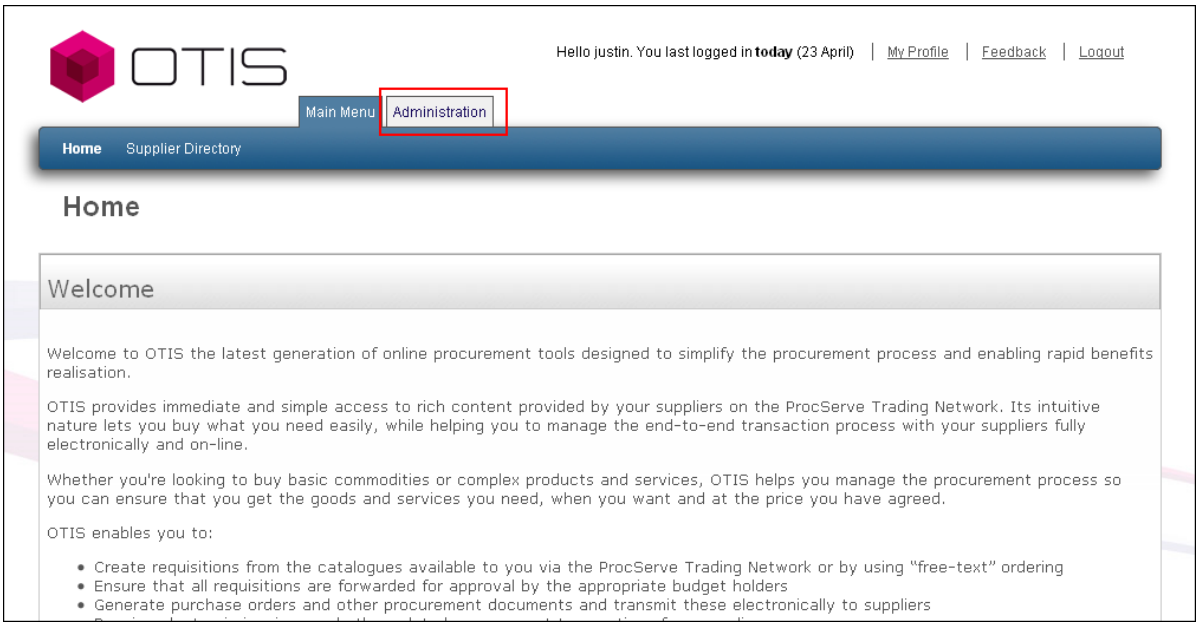
### Overview

This section describes how to create and manage classification views. In the marketplace you administer the catalogue content of the classification view where as in Procserve Commerce Hub you administer what classification views an organisation and its user has access too.

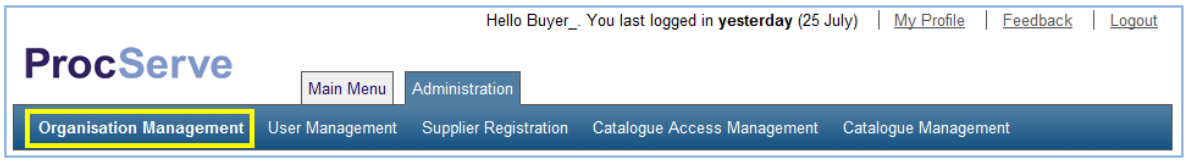
### Adding a new Classification View to the marketplace

### 1. Login to Procserve Commerce Hub

### 2. Click on 'Administration'


OTIS
Hello justin. You last logged in today (23 April) | My Profile | Feedback | Logout
Main Menu
Administration
Home
Supplier Directory
Home
Welcome
Welcome to OTIS the latest generation of online procurement tools designed to simplify the procurement process and enabling rapid benefits realisation.
OTIS provides immediate and simple access to rich content provided by your suppliers on the ProcServe Trading Network. Its intuitive nature lets you buy what you need easily, while helping you to manage the end-to-end transaction process with your suppliers fully electronically and on-line.
Whether you're looking to buy basic commodities or complex products and services, OTIS helps you manage the procurement process so you can ensure that you get the goods and services you need, when you want and at the price you have agreed.
OTIS enables you to:
Create requisitions from the catalogues available to you via the ProcServe Trading Network or by using "free-text" ordering
Ensure that all requisitions are forwarded for approval by the appropriate budget holders
Generate purchase orders and other procurement documents and transmit these electronically to suppliers

### 3. Click on 'Organisation Management'




### 4. Open Classification Views Module

Click on the Classification Views link as indicated in the below image.

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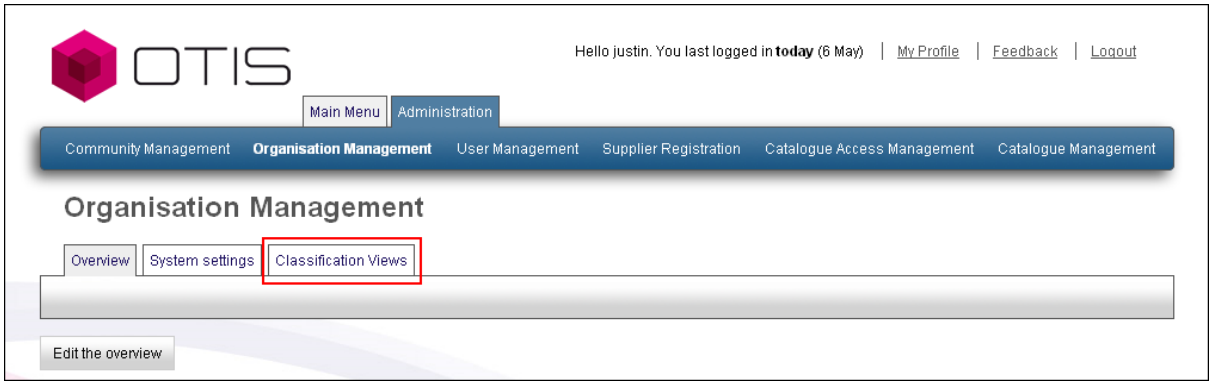
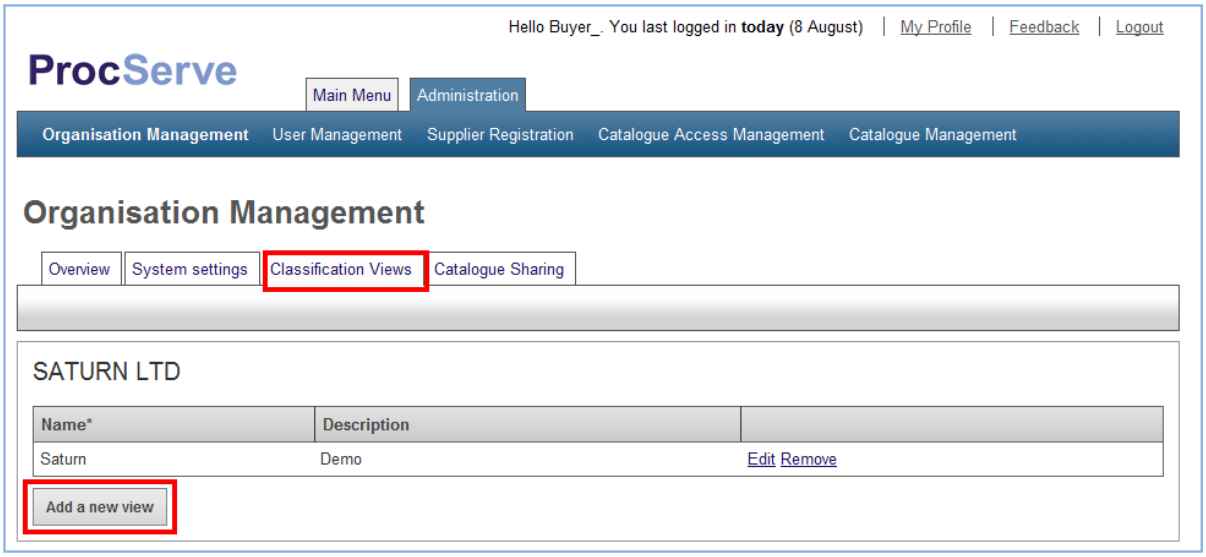



**5. Creating a new Classification View**

To create a new classification view, click on the 'Add a new view' button.




**6. Enter the details for the Classification view, catalogues and classification selection and click the Save icon:**

Enter a name and a suitable description for the catalogue. **Tip:** Ensure the name given to the view is clear enough so that other users within your organisation may be able to work with the view in your absence.

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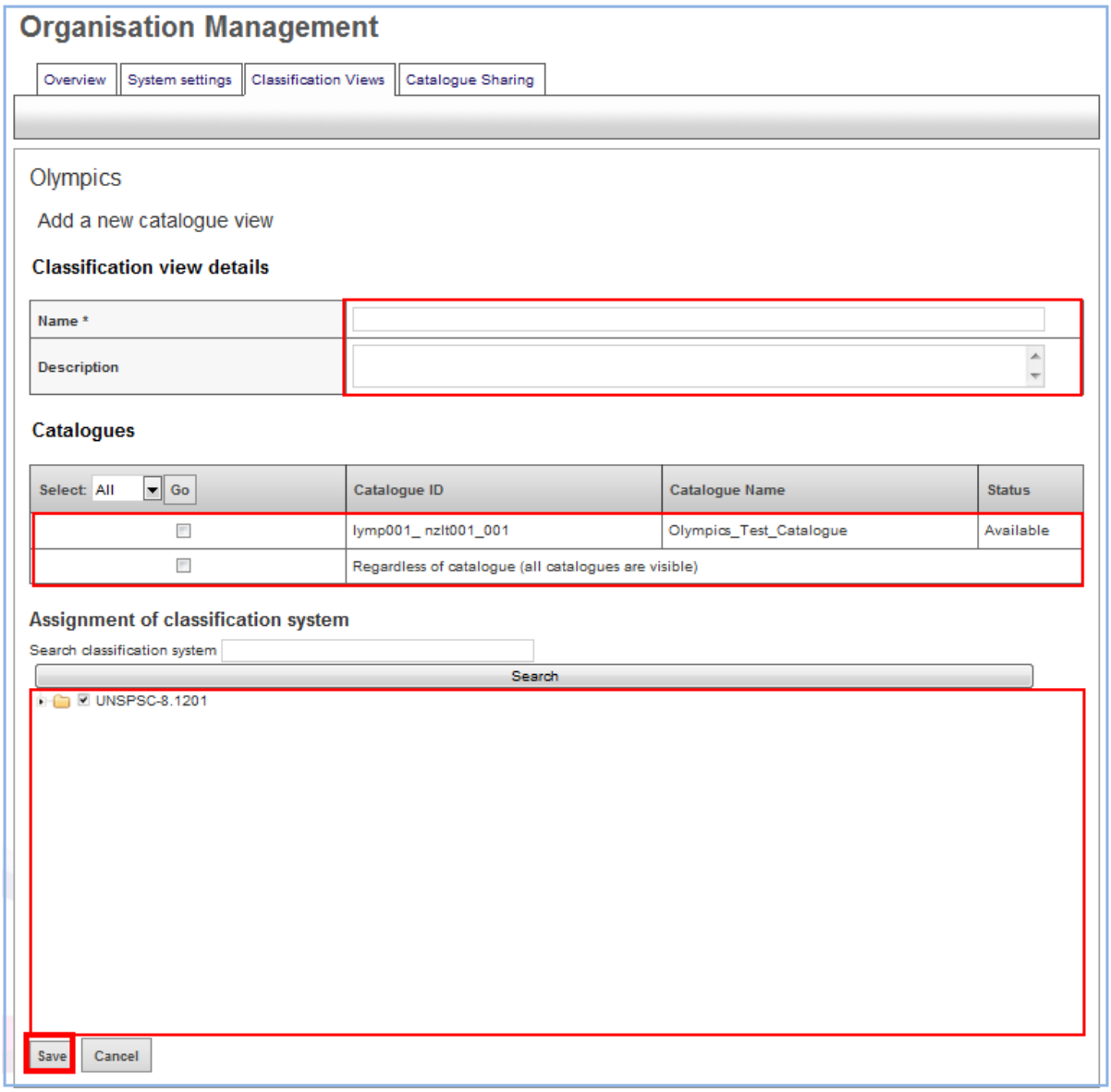


Within the Catalogues section, you can select the catalogue or catalogues you wish to assign to this view. You can then further restrict this by assigning only specific Classification Codes using the UNSPSC tree to locate and select classes to your view. Once complete, click on the 'Save' button.

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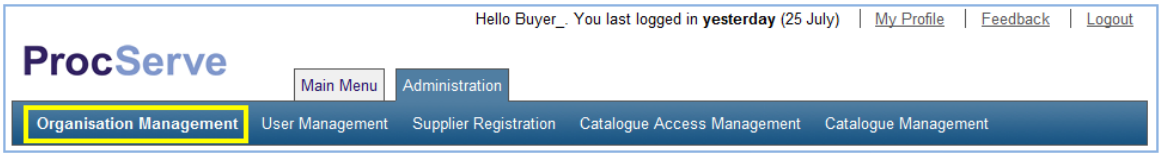
2.3.5.2.2 Editing a Classification View

1. **Login to Procserve Commerce Hub.**

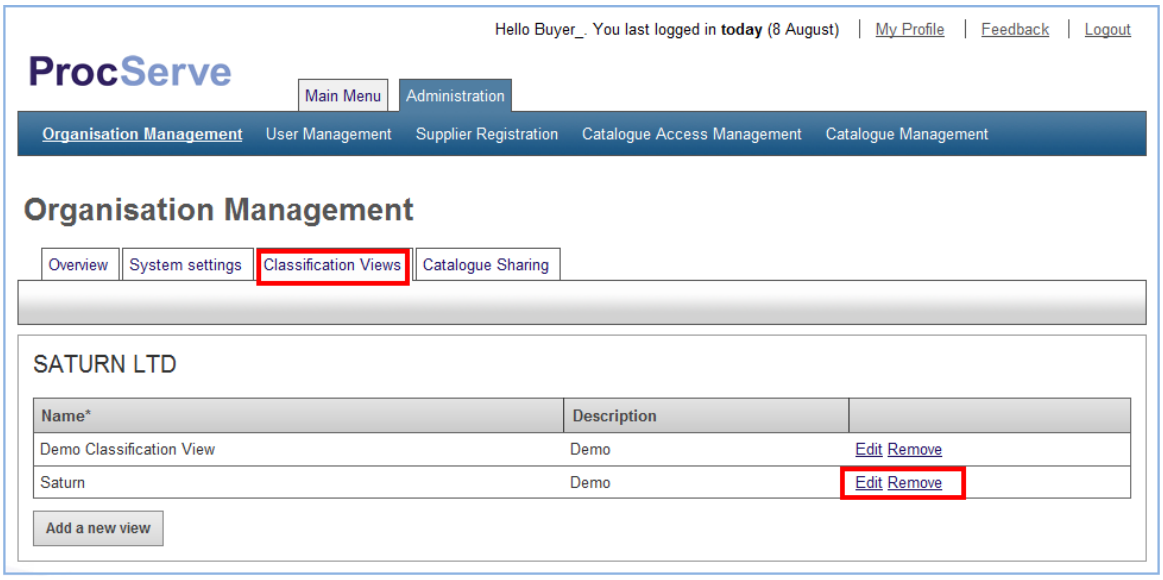
2. **Click on 'Administration'**

3. **Click on 'Organisation Management'**




4. **Click on 'Classification Views'**

5. **Click on 'Edit' to edit the classification view**




6. **Make your changes**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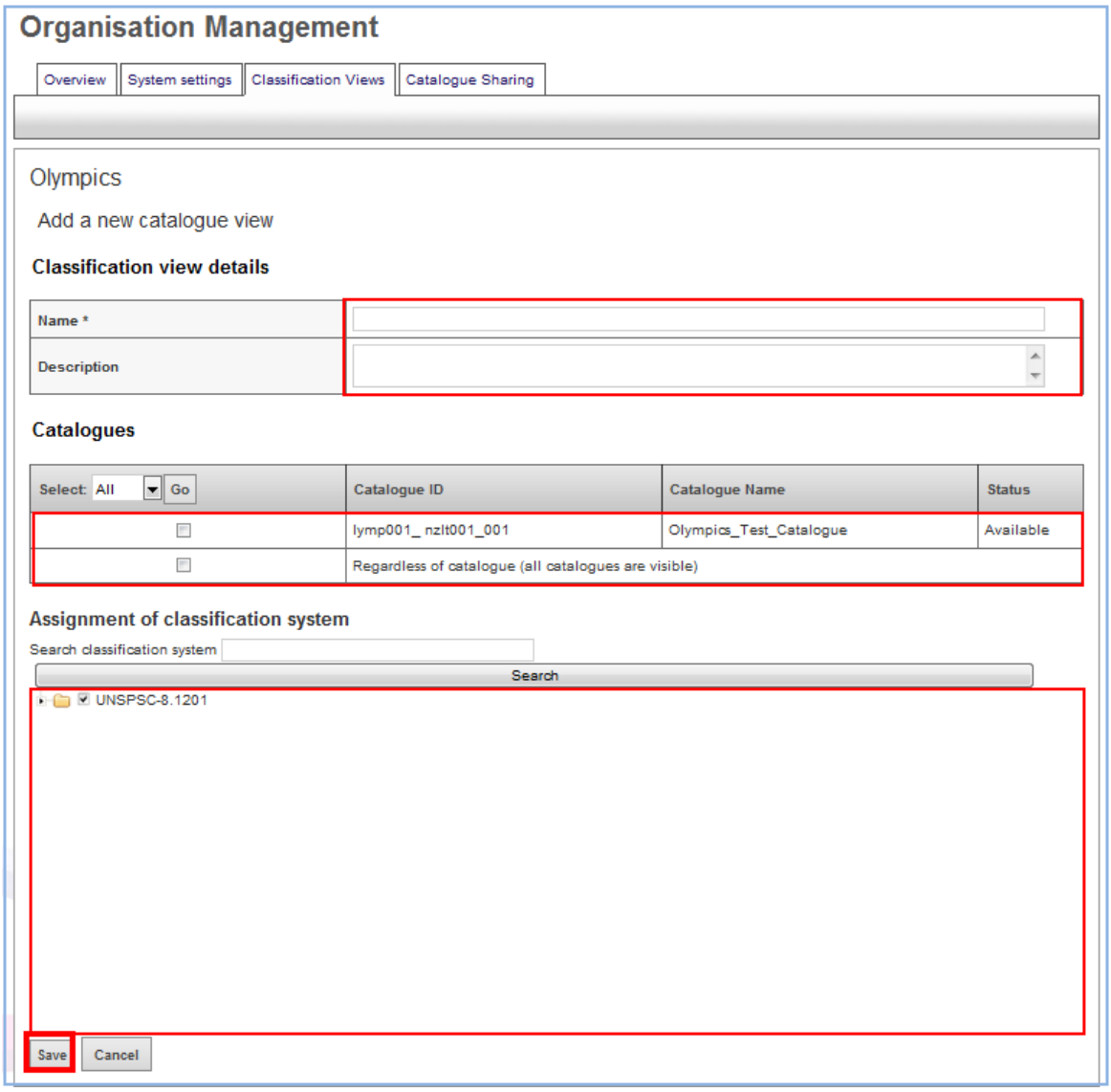


**7. Click 'Save' once complete.**

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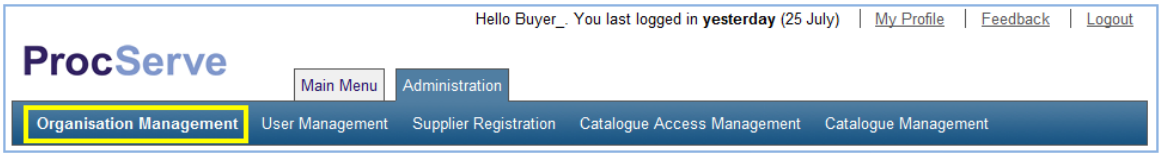
2.3.5.2.3 Removing a Classification View

1. **Login to Procserve Commerce Hub.**

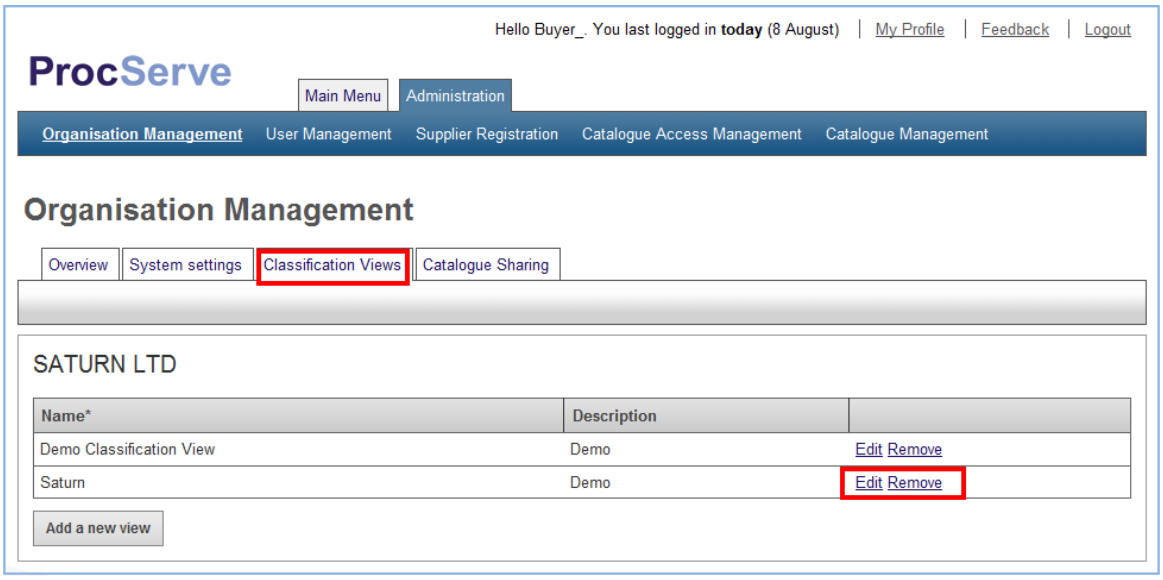
2. **Click on 'Administration'**

3. **Click on 'Organisation Management'**




4. **Click on 'Classification Views'**

5. **Click on 'Remove'**

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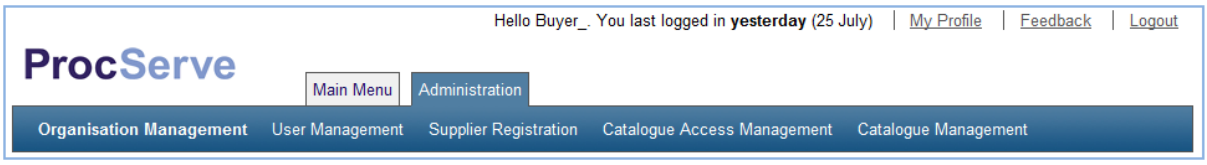
2.3.5.2.4 Add Classification Views to Users in the Procserve Commerce Hub

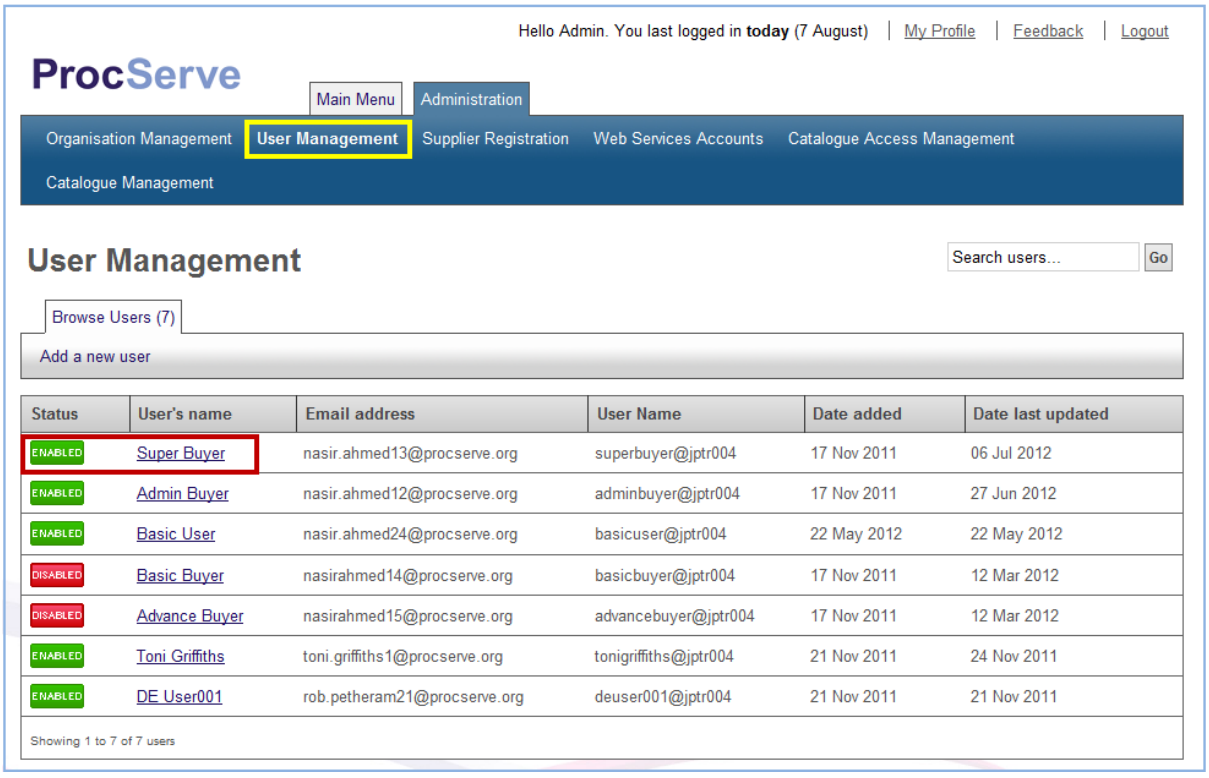
**This section is for organisations using the Procserve Commerce Hub to purchase items. If you are using a P2P system, please see the section "Add Classification Views to Users in the Catalogue Search System"**

**1. Login to Procserve Commerce Hub.**

**2. Click on 'Administration'**




**3. Click on User Management, search and select your user**


Hello Admin. You last logged in today (7 August) | My Profile | Feedback | Logout
ProcServe
Main Menu
Administration
Organisation Management
User Management
Supplier Registration
Web Services Accounts
Catalogue Access Management
Catalogue Management
User Management
Search users...
Go
Browse Users (7)
Add a new user
Status
User's name
Email address
User Name
Date added
Date last updated
ENABLED Super Buyer nasir.ahmed13@procserve.org superbuyer@jptr004 17 Nov 2011 06 Jul 2012
ENABLED Admin Buyer nasir.ahmed12@procserve.org adminbuyer@jptr004 17 Nov 2011 27 Jun 2012
ENABLED Basic User nasir.ahmed24@procserve.org basicuser@jptr004 22 May 2012 22 May 2012
DISABLED Basic Buyer nasirahmed14@procserve.org basicbuyer@jptr004 17 Nov 2011 12 Mar 2012
DISABLED Advance Buyer nasirahmed15@procserve.org advancebuyer@jptr004 17 Nov 2011 12 Mar 2012
ENABLED Toni Griffiths toni.griffiths1@procserve.org tonigriffiths@jptr004 21 Nov 2011 24 Nov 2011
ENABLED DE User001 rob.petheram21@procserve.org deuser001@jptr004 21 Nov 2011 21 Nov 2011
Showing 1 to 7 of 7 users

**4. Go to the Classification View Tab**

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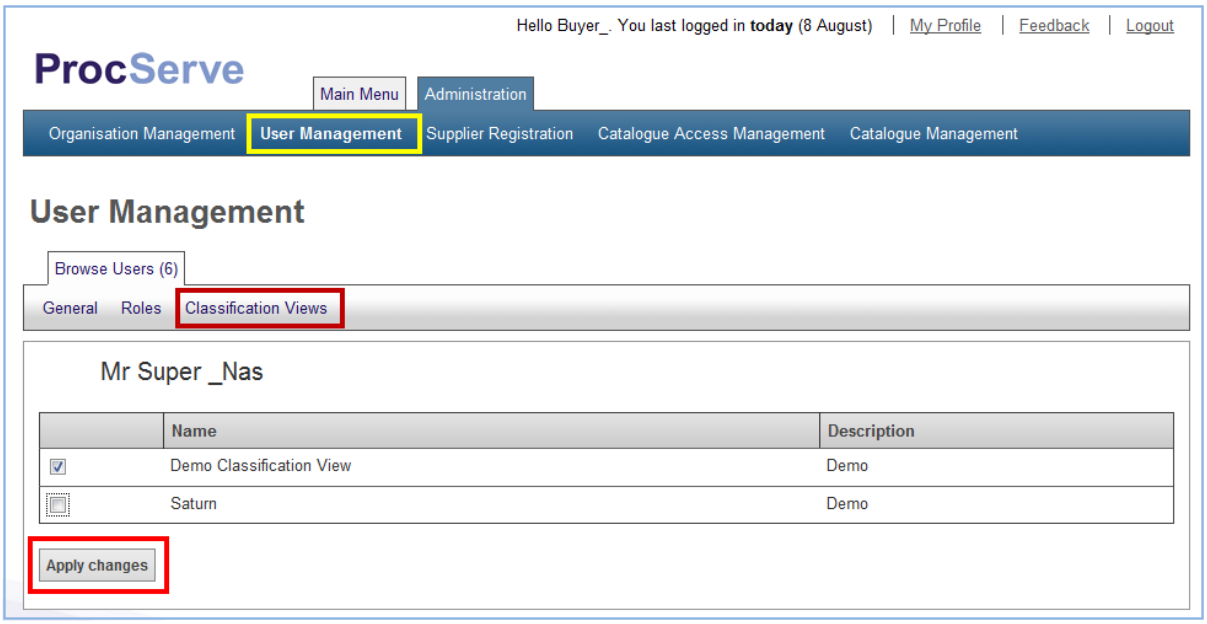


**5. Select the Classification View**

**6. Click on 'Apply Changes'**

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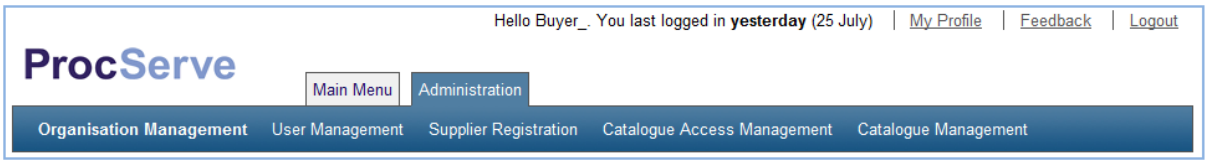
2.3.5.2.5 Add Classification Views to Users in the Procserve Catalogue Search System

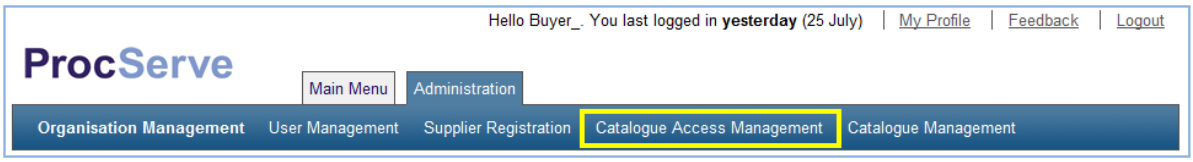
**This section is for organisations using a P2P system to purchase items on the Procserve Commerce Network. If you are using the Procserve Commerce Hub, please see the section "Add Classification Views to Users in the Procserve Commerce Hub"**

**1. Login to Procserve Commerce Hub.**

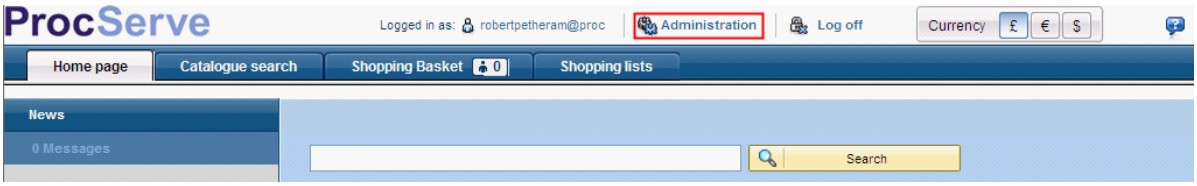
**2. Click on 'Administration'**



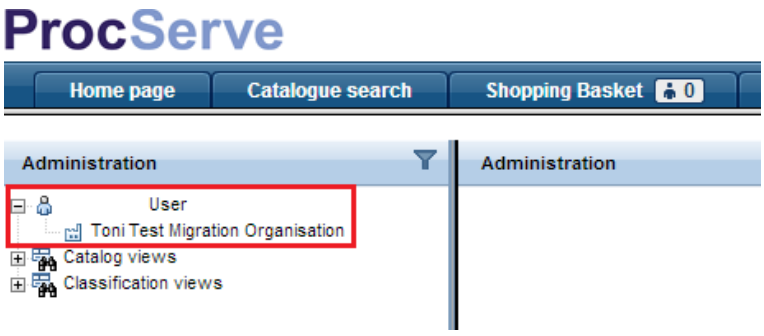

**3. Click on Catalogue Access Management**




A new window will open and the Catalogue Home page is displayed:




**4. Open Administration Module**
Click the Administration link as indicated in the above image. The Administration module is displayed, expand the User area and click on your Organisation name:




**5. Select the user you wish to amend the assigned classification views of**
A list of users will appear on the right had panel. Please note that a user must have punched in to the Catalogue Search System to appear here as they are auto-created based on a template user. In order to amend the views that users get as standard when they first access you need to amend the template user, which has userid _Template.

To select the user, click on the link with the user's identifier:

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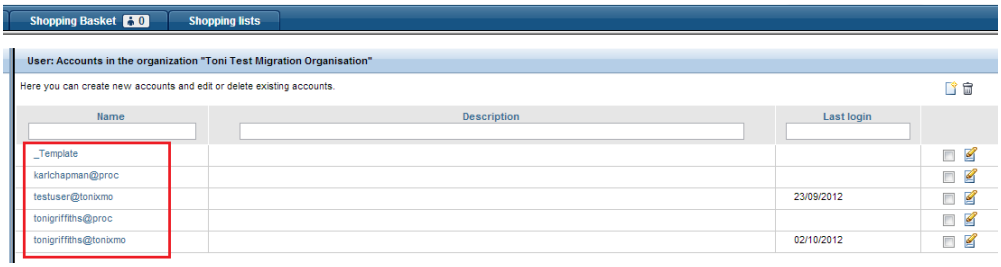
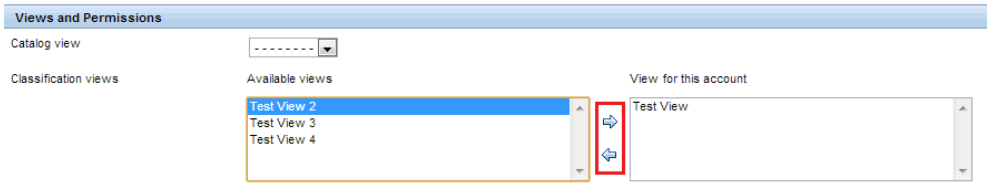



### 6. Edit views assigned to a user

Within the users profile, scroll down to the Classification Views settings. Here you can view the full list of views and the views that have been allocated to the user. To move these from allocated / not allocated, click on the view name and then use the arrows to move the view across.




### 7. Save the user's profile

Once you have finished changing the views allocated to the user, you need to save the users profile by selecting the save button at the top right of the pane.

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# 3
# Catalogue Shopping

# 3 Catalogue Shopping

## 3.1 Overview of Catalogue Searching

**Overview**

The search engine allows you to run to various types of search for items in the catalogues available to you. This section will provide you with a brief overview of how the search functionality works and give you some hints and tips on the best ways to use the search engine.

**How does search work?**

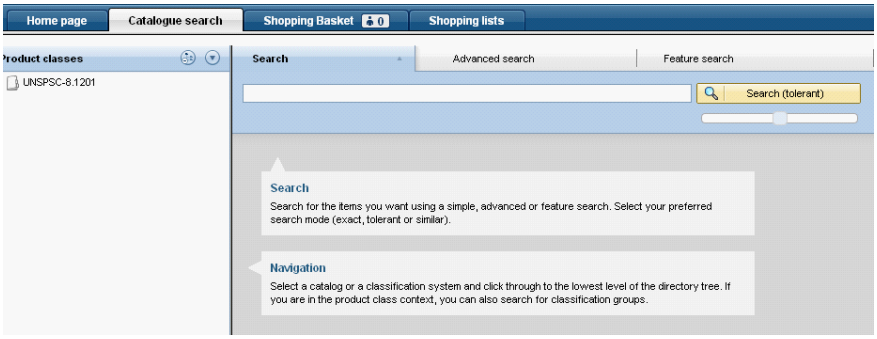
When a supplier creates a catalogue, they complete a template that mandates information put into key fields to fully describe the products or services that they provide. When you enter a search term, the search engine searches across some of these fields to ensure you return the best possible results.

The key fields that a supplier completes and the system searches across are:

- **Supplier Item Number**
- **Item Short Description**
- **Item Long Description**
- **Supplier Name**
- **Manufacturer Item Number**
- **Manufacturer Name**
- **Item Keywords**

When searching, the system allows you to adjust how the search works across the searchable fields by using the slider bar on the catalogues tab. Moving the slider bar will change how the system searches and will affect how many results are returned.

The slider bar has three settings and these are described below:


Home page
Catalogue search
Shopping Basket 0
Shopping lists
Product classes
UNSPSC-8.1201
Search
Advanced search
Feature search
Search (tolerant)
Search
Search for the items you want using a simple, advanced or feature search. Select your preferred search mode (exact, tolerant or similar).
Navigation
Select a catalog or a classification system and click through to the lowest level of the directory tree. If you are in the product class context, you can also search for classification groups.

| | |
|---|---|
| **Exact** | The search details you type in the search field must exactly match what is in the catalogue |
| **Tolerant** | The system will allow for some minor discrepancies including some common spelling mistakes e.g. **recieved** will find **received** |
| **Similar** | The system will use a wider scope and broaden the search based on the |

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| | |
|---|---|
| | information you used in the search field. For example, if you searched for **towel** you could return **trowel**. |

This table below shows what fields are searched and how they are searched based on which slider bar setting is selected:

| Slider bar setting | Item Number | Short Description | Long Description | Keywords | Supplier Name | Manufacturer Item Number | Manufacturer Name |
|---|---|---|---|---|---|---|---|
| Exact | Equal | Contains | Contains | Not Used | Equal | Equal | Equal |
| Tolerant | Begins With | Tolerant | Tolerant | Contains | Contains | Begins With | Contains |
| Similar | Begins With | Similar | Similar | Similar | Contains | Begins With | Contains |

When a search term is entered, the results may include where the word(s) appear in any order in:

- **A single field**
- **Across one or more fields** (e.g. one word in short description and one word in supplier name).

**Using the System – Example**

You would like to order some A4 Books. You decide to type A4 Book in the search field and click search. The system will perform a search for each word individually and return items where one of the words exists in one of the searchable fields.

Some typical examples of the types of results you can expect to see from this search are below with the words returned by the search in **bold**:

| Supplier Part No. | Short Description | Long Description | Supplier Name | Keywords |
|---|---|---|---|---|
| Z1A223 | **A4** Paper | A4 Reams Note Pad in various sizes | **Book** and Paper Co | Paper, Reams |
| 086-961 | Reading **Book**s | A5 & **A4** Reading **Book**s | Schools Supply Co | **Book**, reading, children |
| 116-630 | **A4** Writing Pads | | Schools Supply Co | Pad, recycled, a4, **Book** |
| Q3T376 | Address **Book**s | Hard Backed address book with tabs. Size **A4** | **Book** and Paper Co | |
| R5C945 | **A4 Book**s | **A4** Size **Book**s | **Book** and Paper Co | |

**Other Ways of Searching - Exact Word and Wild Card Search**

There are some additional elements of functionality that can be used to enhance the search process

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dependant on what you want to search for:

- **Exact Word Search:**

If you want to search for an exact word or words, you should place the word(s) in quotation marks. This will find the word(s) in the order entered within a single searchable field.
Using the same example as above, searching for "A4 Book" will bring back results from the highlighted columns as they are the only ones with the search term in a single field.

| Supplier Part No. | Short Description | Long Description | Supplier Name | Keywords |
|---|---|---|---|---|
| Z1A223 | **A4** Paper | A4 Reams Note Pad in various sizes | **Book** and Paper Co | Paper, Reams |
| 086-961 | Reading **Book**s | A5 & **A4** Reading **Book**s | Schools Supply Co | **Book**, reading, children |
| 116-630 | **A4** Writing Pads | | Schools Supply Co | Pad, recycled, a4, **Book** |
| Q3T376 | Address **Book**s | Hard Backed address book with tabs. Size **A4** | **Book** and Paper Co | |
| R5C945 | **A4 Book**s | **A4** Size **Book**s | **Book** and Paper Co | |

- **Wildcard Search:**

There are two variations on the wildcard search available to a user. A question mark is used to replace a single character and an asterisk is used to replace any number of characters.

**Question Mark (?)**
Use this to replace a single character within a search. Searching for **wh?te** will return results such as **white** and **whyte.**

**Asterisk (*)**
Use this to replace a string of letters either at the end or beginning of a word. Searching for **ave*** will return results such as **Ave**ry Labels**, ave**rage contents and winged **ave**nger. Searching for ***ave** will return results such as W**ave** Pens, Super S**ave** Ltd and r**ave** reviews.

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## 3.2 How to Search

### Overview – How To Search

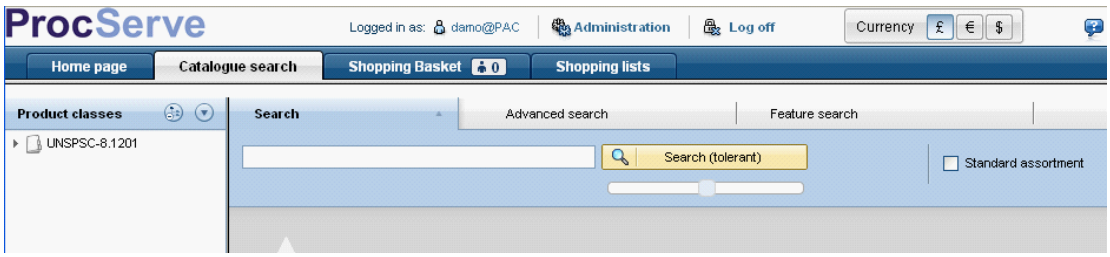
This section shows you the various ways to use the search functionality.

### Locating the catalogue search feature

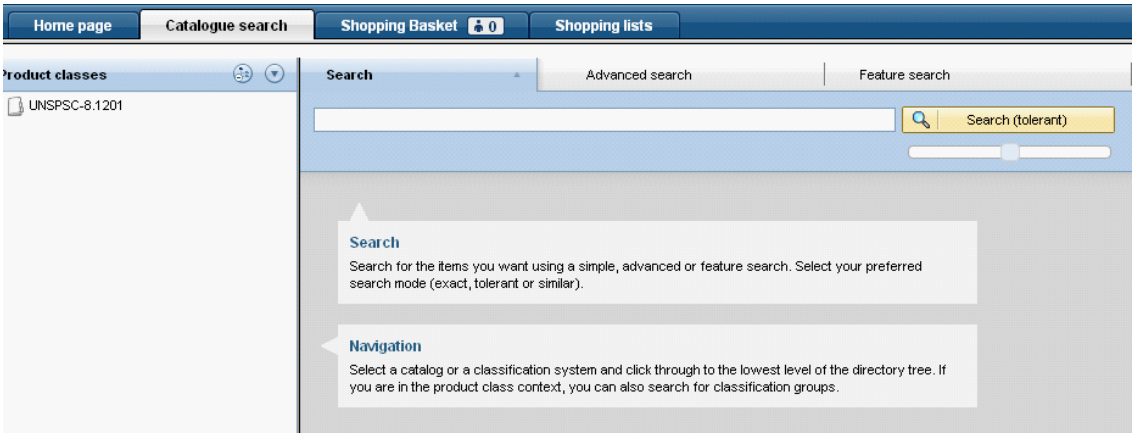
The following steps describe how you locate and use the catalogue search feature to create a requisition from a catalogue:

**1. Punch-out from your P2P in to the Marketplace:**

**2. The catalogue is opened in a new window:**
From here you can complete a simple keyword search in the search field.




**3. Using the Search Features to find your items:**
Click the catalogue search tab:


Home page
Catalogue search
Shopping Basket 0
Shopping lists
Product classes
UNSPSC-8.1201
Search
Advanced search
Feature search
Search (tolerant)
Search
Search for the items you want using a simple, advanced or feature search. Select your preferred search mode (exact, tolerant or similar).
Navigation
Select a catalog or a classification system and click through to the lowest level of the directory tree. If you are in the product class context, you can also search for classification groups.

**The following list describes ways you can search:**

| | |
|---|---|
| **Product Classes** | You can use the UNSPSC tree to the left of the search page to navigate through the folder structure to a Product Class in order to return the items classified within that Product Class as shown below. **Note:** Only UNSPSC codes which you have access to will be displayed. |

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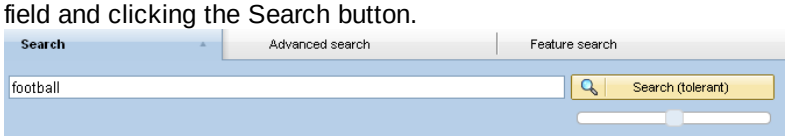
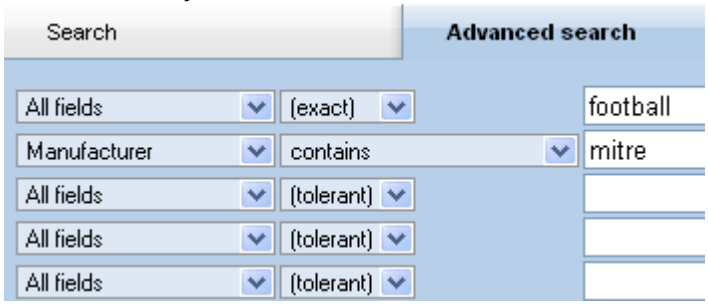
| | |
|---|---|
| | |
| **Search Tab** | A simple search allows you to locate items by entering keywords in the Search field and clicking the Search button.<br>  |
| **Advanced Search** | The Advanced Search allows you to search specific fields and with conditions. Click the Advanced Search tab to display the advanced search fields and build your search rules as shown below.<br>  |
| **Feature Search** | The Feature Search allows you to filter items within your Search results that meet certain criteria. To perform a Feature Search you need to select the Feature Search tab and a Product Class from the left hand pane, before selecting from the drop down boxes the features that you wish your items returned to contain as shown below:<br> |

**Tip:** The catalogue and or UNSPSC code must be assigned correctly in the Classification Views for you to be able to find it.

**Tip:** When a catalogue is exported, its contents can only be found during Shopping using the UNSPSC Tree Structure until the Search Index has been rebuilt. The Search Index is scheduled to run 23:00 daily. Once this is complete you can use the Search Tab to find items.

**Tip:** Only some catalogues will support feature search.

**Tip:** If you cannot found the items you wish to order - try the UNSPSC Tree search feature.

**Tip:** If you have too many items to work with you can filter your search using the Simple or Advanced Search features.

### 4. Filter on Search Results

When you search for a specific item, you will then see a filter option on the left hand side where there will be a number of options for you to choose from

**Options include:**

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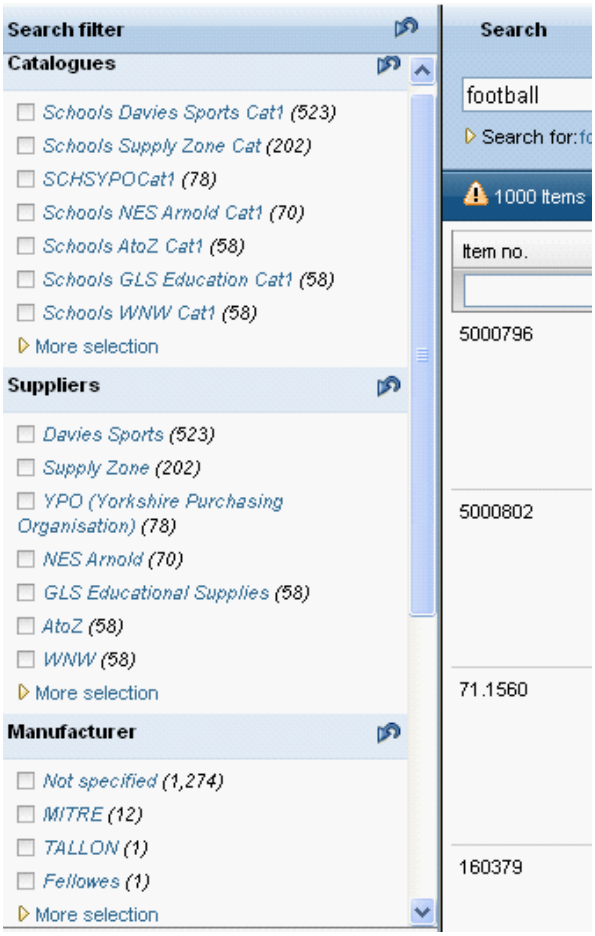
- **A breakdown of items per catalogue**
- **A breakdown of items per supplier**
- **A breakdown of items per Manufacturer**
- **A breakdown of items per Lead Time**
- **Product Classes**




If you tick on one of the options in the filter results, you will be presented with more item details and further breakdown of information from chosen supplier:

For more information see **'The Item Details Page'** section of this guide.

**5. Working with the Search Results:**

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| | | |
|---|---|---|
| **Add to Shopping List** | | You can add all the checked items to a Shopping List which you can change and re-use later |
| **Add to Comparison List** | | You can add all the checked items to a Comparison |
| **Add to Favourites** | | You can add all the checked items to your Favourites List for future use |
| **Add Selected Item(s) to cart** | | Check each item to be added and click the shopping cart icon |

.

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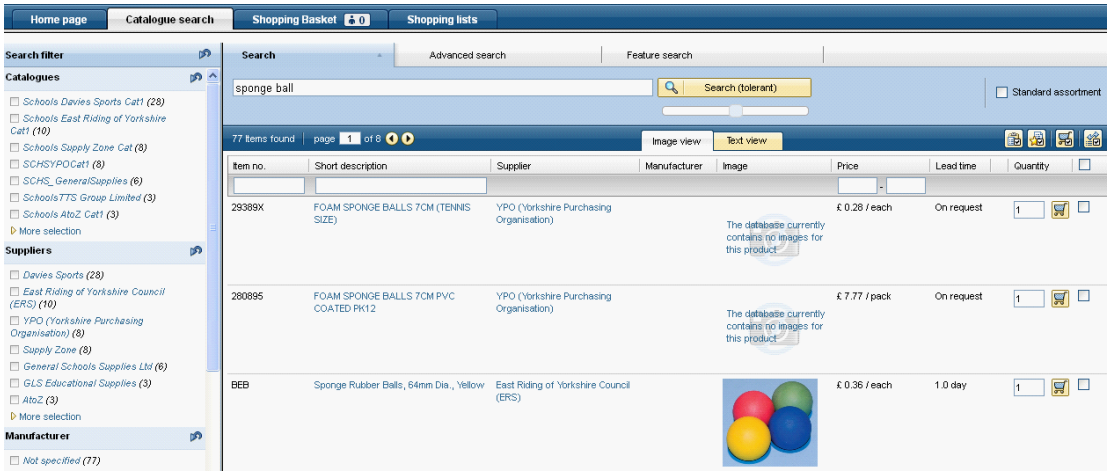
## 3.3 Examples of Searching

Here are some common examples of using the search system

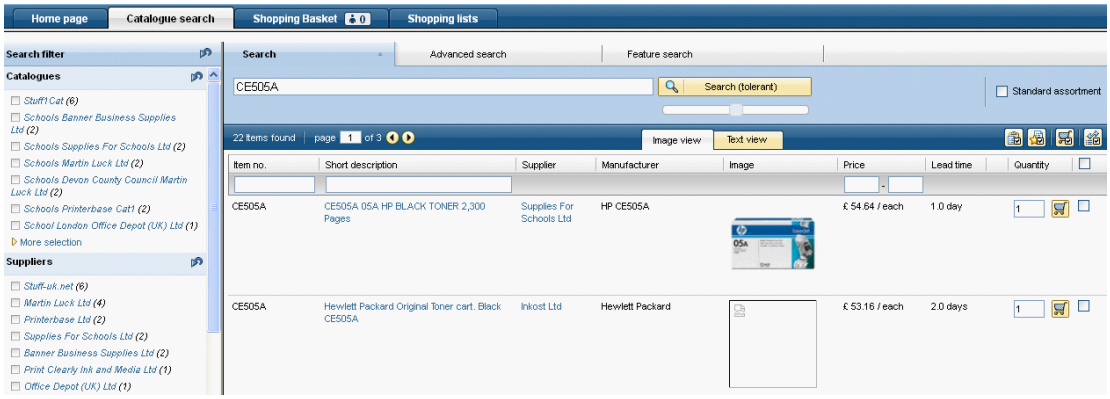
**Q. I want to buy a sponge ball but am unsure exactly what type of sponge ball I want.**

A. Try putting both words (sponge and ball) into the search box. Putting in just one of the words may make your search too wide.




**Q. I need a toner cartridge for a HP LaserJet P2550d printer. The code on the cartridge is CE505A.**

A. Try searching for the cartridge model number (CE505A). Put CE505A in the search field and this will return results with the product code anywhere within them.




**Q. I want to buy some AA batteries from my local supplier Hills Components Limited.**

A. You could try putting AA into the search field. This however would bring back too many results as the search term entered is too vague. You could try adding additional words to the search such as battery but this would also bring back items from suppliers you are not interested in.

To get a precise return, use the advanced search functionality. Put the words Hills and AA as shown in the example below making sure each term searches on the correct field.

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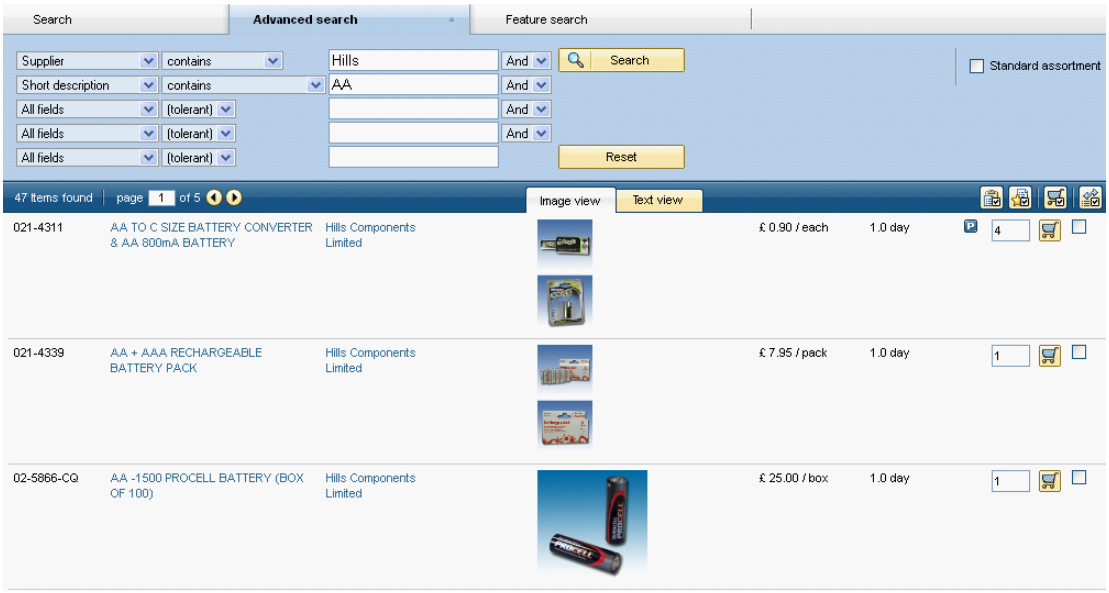
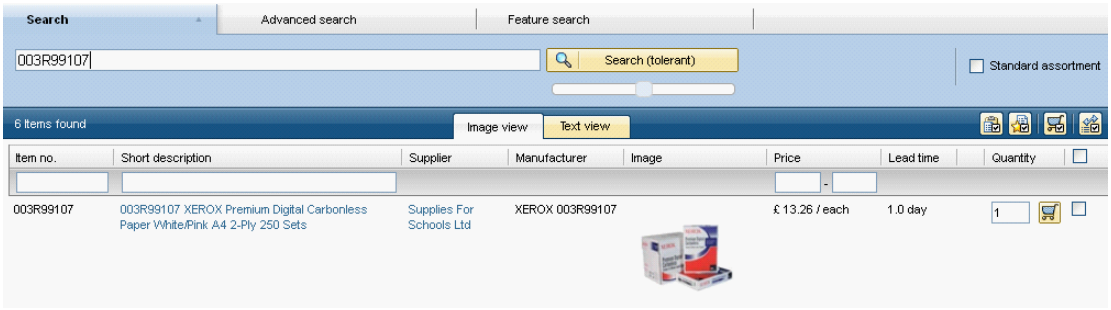



**Q. I have been asked to get some carbonless 2 ply paper in white/pink. I have been given the product code from the supplier's catalogue but have not been told the suppliers name.**

A. Enter the product code into the search field. If the supplier has a catalogue on the system then the item will be returned.




**Q. I need to find the price on an anemometer but am unsure how it has been spelt by the supplier.**

A. Try searching using the beginning of the word then using the wildcard search tool. Put anem* into the search field. If this brings back too many results then consider adding extra letters to your search. This example will bring back items with the letters anem at the beginning of a word in the item data.

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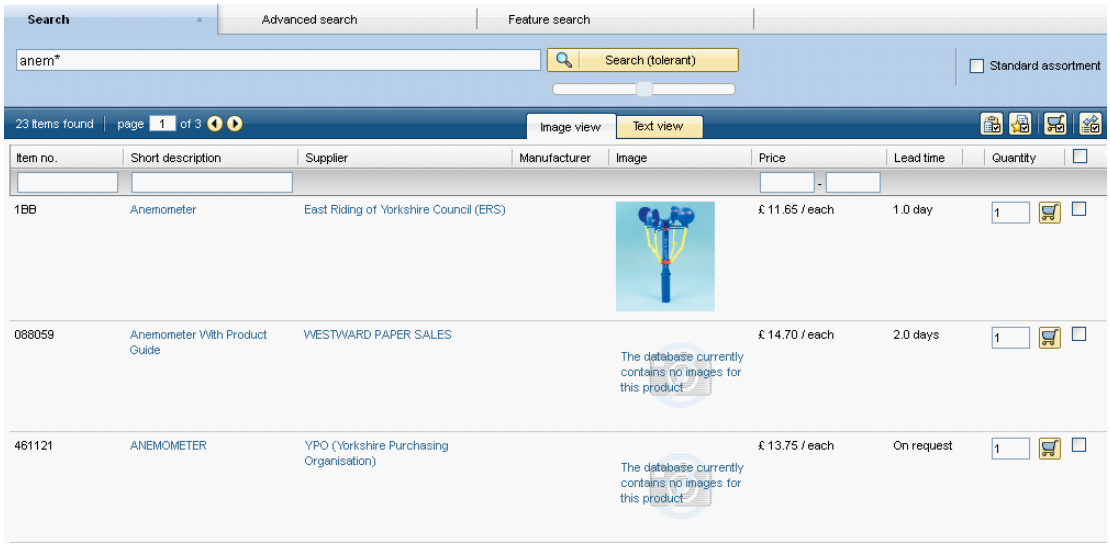


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# 3.4 The Items Details Page

### Overview

This section describes how to use the Item Details page.

The Item Details page provides you with a detailed description of an item and a list of related items you may wish to consider.

### Locating the Item Details Page

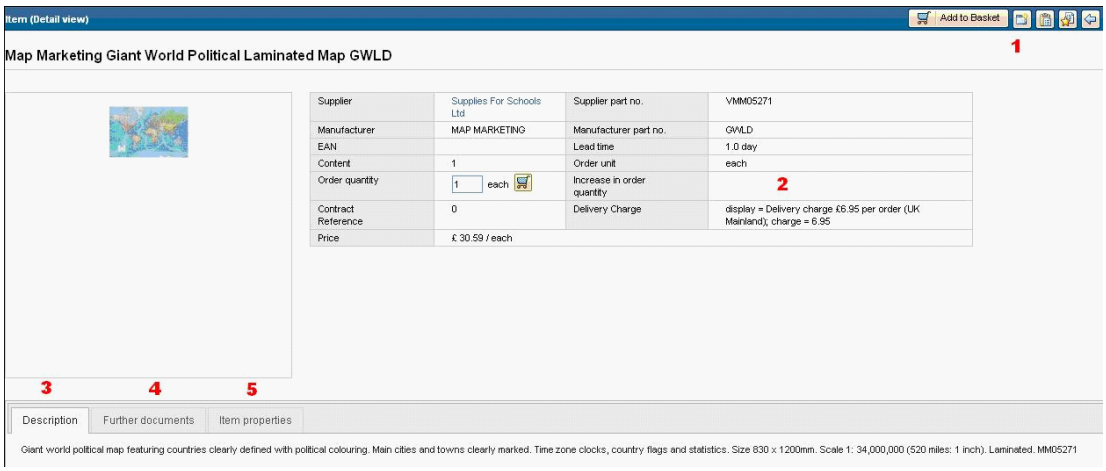
The Item Details page is accessed from:

• **The Shopping Cart**. In the shopping cart click the short description to display item details in a popup window.

• **The Search Results List**. In the Search Results area click the short description to display item details in the Search Results area.

### About the Item Details Page

The following image is an example of the Item Details page from an item in the Search area. The three numbered areas are (1) Action Icons; (2) Item Details; and (3) Associated Items. These are shown in greater detail below:




The following list describes the major features of Items details page:

**(1) Action Icons:** These icons are not displayed if the item is already in your Shopping Cart:

| | | |
|---|---|---|
| **Add Item to Basket** | | Click to add item to your Shopping Basket |
| **Open Items Details** | | Click to view item details in new window |
| **Add to Favourites** | | Click to add item to your Favourites List |
| **Add to Shopping List** | | Click to add item to your Shopping List |
| **Return to Search Page** | | Click to return to Search Page |

**(2) Item Details:** A summary of the item details. To view any associated documents click on any link in the Further Documents field.

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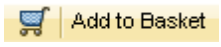
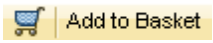
| | | |
|---|---|---|
| **Add to Shopping Cart** |  | Click to add item to your Shopping Basket |

**Note**: In the Shopping Cart item details pop-up you cannot change the quantity.

**(3) Description**: This gives a more detailed description of the item.

**(4) Further Documents:** This may include additional images

**(5) Item Properties:** This may include further details of item

| | | |
|---|---|---|
| **Add to Basket** |  | Click to add item to your Shopping Basket |

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# 3.5 Comparing Items

### Overview

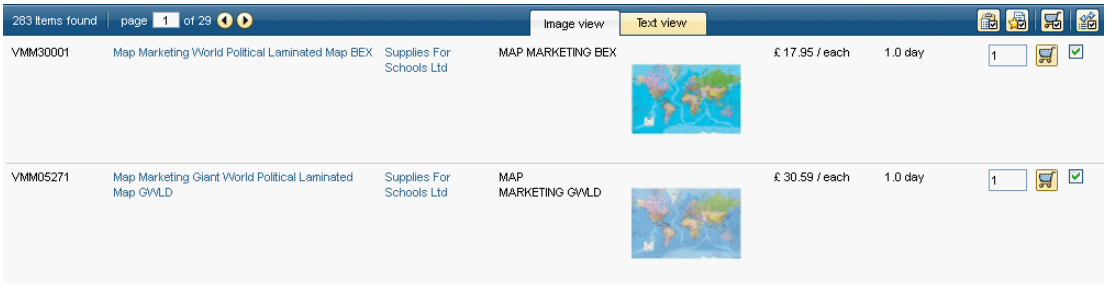
This section describes how to compare items. You can build a list of items to be compared and compare one of the items against the others.

### Building the Compare Item List

The following steps describes how you can add items to and use the Comparison List:

**1. Locate the items you are considering purchasing.**

**2. Mark the items you wish to compare by selecting the right check box for each item:**
For example:




**3. Add Selected Items**.

Click the Add Selected Items icon. Items details are listed in the Compare Items window:

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| | Compare with this column | Compare with this column |
|---|---|---|
| Short description | **Map Marketing World Political Laminated Map BEX** | **Map Marketing Giant World Political Laminated Map GWLD** |
| Price | £ 17.95 / each | £ 30.59 / each |
| Supplier | Supplies For Schools Ltd | Supplies For Schools Ltd |
| Supplier part no. | VMM30001 | VMM05271 |
| Manufacturer | MAP MARKETING | MAP MARKETING |
| Manufacturer part no. | BEX | GWLD |
| EAN | | |
| Content/Order unit | 1 / each | 1 / each |
| Lead time | 1.0 day | 1.0 day |
| Description | Bartholomew Executive World Map. Laminated map that shows countries clearly defined with political colouring. Main cities and towns are clearly marked along with time-zone clocks. Size 37x59 MM30001 | Giant world political map featuring countries clearly defined with political colouring. Main cities and towns clearly marked. Time zone clocks, country flags and statistics. Size 830 x 1200mm. Scale 1: 34,000,000 (520 miles: 1 inch). Laminated. MM05271 |
| Unit of Purchase Quantity | 1 | 1 |
| Image | | |
| Further documents | Item Information URL | Item Information URL |

**Tip**: If you want to compare items on several different pages of the comparison list, you must click on before you go to the next page otherwise your selection will be lost. The comparison list will be retained if you close the window with or if you use the search function to create a new item list. You can open the comparison window again by clicking on .

**4. Using the Compare Items List:**

Compare with This Column Check Box. Check this box to highlight differences between this item and all other items.

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| | Compare with this column | Compare with this column |
|---|---|---|
| Short description | **Map Marketing World Political Laminated Map BEX** | **Map Marketing Giant World Political Laminated Map GWLD** |
| Price | £ 17.95 / each | £ 30.59 / each |
| Supplier | Supplies For Schools Ltd | Supplies For Schools Ltd |
| Supplier part no. | VMM30001 | VMM05271 |
| Manufacturer | MAP MARKETING | MAP MARKETING |
| Manufacturer part no. | BEX | GWLD |
| EAN | | |
| Content/Order unit | 1 / each | 1 / each |
| Lead time | 1.0 day | 1.0 day |
| Description | Bartholomew Executive World Map. Laminated map that shows countries clearly defined with political colouring. Main cities and towns are clearly marked along with time-zone clocks. Size 37x59 MM30001 | Giant world political map featuring countries clearly defined with political colouring. Main cities and towns clearly marked. Time zone clocks, country flags and statistics. Size 830 x 1200mm. Scale 1: 34,000,000 (520 miles: 1 inch). Laminated. MM05271 |
| Unit of Purchase Quantity | 1 | 1 |
| Image | | |
| Further documents | Item Information URL | Item Information URL |

**5. Differences are highlighted as shown in the above image.**

**6. On the Compare Page you can:**

| | | |
|---|---|---|
| **Remove Item** | | Click the Remove Icon to remove the relevant item from the Comparison List. |
| **Add to Cart** | | Click the Add to Cart icon to add the relevant item to your shopping cart. |
| **Empty Compare List** | | Click this icon to close the Comparison window and empty the Comparison List. |

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# 3.6 Smart Forms

### Overview

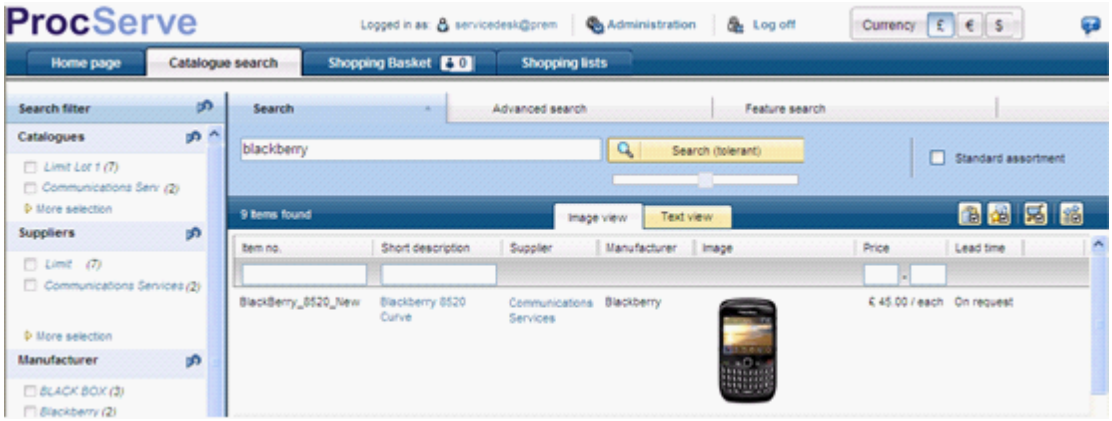
This section describes Smart Forms and how to use them.

### What is a Smart Form?

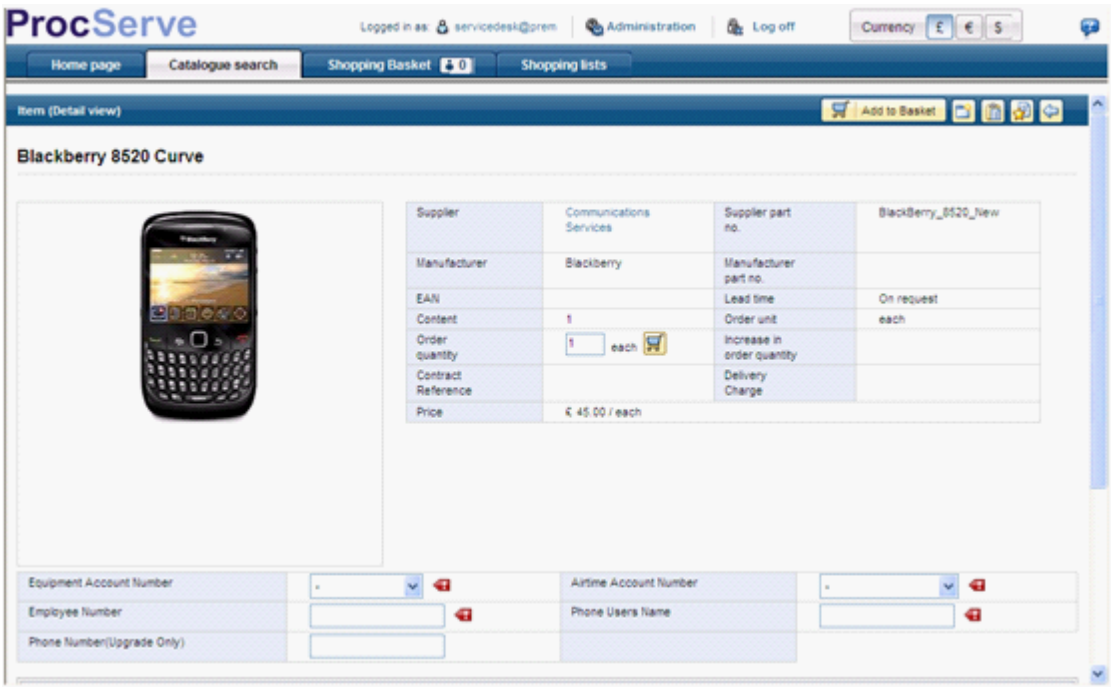
A Smart Form is used in certain catalogues to capture additional information that is typically unique to the particular purchase. Smart Forms enable the supplier to create user defined fields which can be either free text or drop down lists. Each field can be specified as either mandatory or optional with those fields that are mandatory needing to be completed before you can check out.

### Completing the Smart Form?

The Smart Form is contained within the items details of the line item.




**1. Clicking the link of an item will take you in to the details**




**2. The Smart Form details can then be completed as required**

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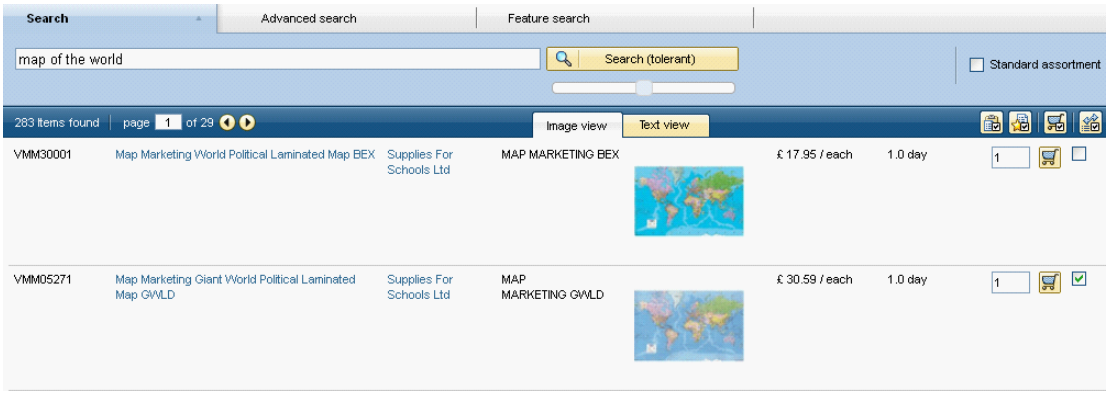
# 3.7 Adding Items to your Shopping Cart

**Overview**

This section describes how you add items to your Shopping Basket and manage your shopping cart.

**1. Adding Items to your Cart:**

Having found the item or items you wish to add to your requisition in the Search page you can now add them to your cart:




**2. If required you can change the quantity and check the box in the right hand column:**

If you only require this item then you can add item to shopping basket by clicking on the Shopping Basket icon

, or if more than one item is ticked on you can click on the Add Selected Items To Shopping Basket Tab

.

If you want to continue shopping, you can simply search for another item and repeat above process.

**3. When you add items to your shopping cart the shopping cart tab will flash for a short while and will be updated with the number of items you added:**

For example if you added an item to your shopping cart that already had an item in it the new total will be two:

**4. Reviewing Shopping Cart:**

You can review and update your shopping cart and when you are satisfied with the items send the requisition. At any time during shopping you can click the shopping cart tab to view the contents:

The shopping cart contains the items you have selected for your requisition. You can continue shopping by clicking the catalogue search tab at any time.

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You can add or remove items from your cart, change quantities or cancel the purchase.

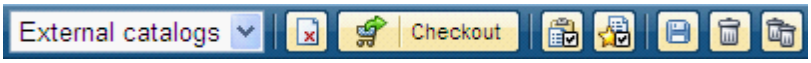
Also note that delivery charge if applicable, will be included in the shopping basket tab

The table below highlights the additional options available to you when working with the Shopping Cart:

| | | |
|---|---|---|
| **External Catalogues** | | You can punch out to an external catalogue. |
| **Items** | | You can click on the Short Description to view a more detailed description of the item. |
| **Cancel Purchase** | | To cancel the purchase, click the Cancel Purchase icon. |
| **Save Changes** | | You can make changes to the items in the cart. For example: change quantities. Click the Save Changes icon to save your changes. |
| **Delete Selected Items** | | Click this item to delete all items that have their right column boxes checked. A prompt is displayed. Click the OK button to delete the items. Click the Cancel button to cancel the deletion. |
| **Delete All Items** | | Click this item to delete all items in the cart. Click the OK button to delete the items. Click the Cancel button to cancel the deletion. |
| **Add to Shopping List** | | You can add all the checked items to a Shopping List which you can change and re-use later. |
| **Add to Favourites** | | You can add all the checked items to your Favourites List for future use. |

**6. Checkout:**

When you have checked that the items you wish to order are OK you are ready to click the checkout button.




**Note**: The order will not be sent to the supplier until your requisition has been approved.

**Note: Shopping Basket Caching -** Unless you cancel the purchase or checkout, your basket and its items will be cached. So the next time you log in to the Marketplace, your items will still be in your basket.

**7. If your Checkout is successful:**
You will be redirected to your P2P or back office system.

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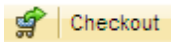
## 3.8 Working with your Shopping Cart

**Overview**

You can make changes to your cart, cancel the purchase or send the requisitions using the cart. The following list provides a description of the components of the shopping cart:

| | | |
|---|---|---|
| **External Catalogues** | | You can punch out to an external catalogue. |
| **Items** | | You can click on the Short Description to view a more detailed description of the item. |
| **Cancel Purchase** | | To cancel the purchase click the Cancel Purchase icon. |
| **Add Multiple Item(s) to cart** | | Check each item to be added and click the multiple shopping cart icon. |
| **Save Changes** | | You can make changes to the items in the cart. For example: change quantities. Click the Save Changes icon to save your changes. |
| **Delete Selected Items** | | Click this item to delete all items that have their right column boxes checked. A prompt is displayed. Click the OK button to delete the items. Click the Cancel button to cancel the deletion. |
| **Delete All Items** | | Click this item to delete all items in the cart. Click the OK button to delete the items. Click the Cancel button to cancel the deletion. |
| **Add to Shopping List** | | You can add all the checked items to a Shopping List which you can change and re-use later. |
| **Add to Favourites** | | You can add all the checked items to your Favourites List for future use. |
| **Checkout** |   | Click this icon when you are ready to send the requisition. The requisition will now be available for the authoriser to import into your back office for approval |

You may also notice a number of icons next to specific items. These are used by suppliers, where relevant, to enhance specific items:

The following is a guide to icons you may see on the marketplace:

| | | |
|---|---|---|
| Central Hub Item | | Content from this icon is from Mandated Contracts. UK Public Sector Organisations only. |
| Collaborative-Content | | Item is part of Collaborative Contract or Framework Agreement |

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| | | |
|---|---|---|
| Core-Item | | Core-Item within a contract |
| Environmentally-Friendly | | Items showing this icon are recyclable, bio-degradable, carbon neutral or otherwise Environmentally Friendly. |
| Hazardous-Item | | Items displaying this icon are Hazardous Materials (HazMat). |
| Price-Break | | Price Breaks occur when you receive a discount for buying larger quantities of this item. |
| Required Associated Item(s) | | A Required Associated Item(s) is an item which MUST be purchased if the original item is purchased. |
| Optional Associated Item(s) | | Optional Associated Item(s) are not automatically added to shopping basket. |

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# 3.9 Working with Favourites

### Overview

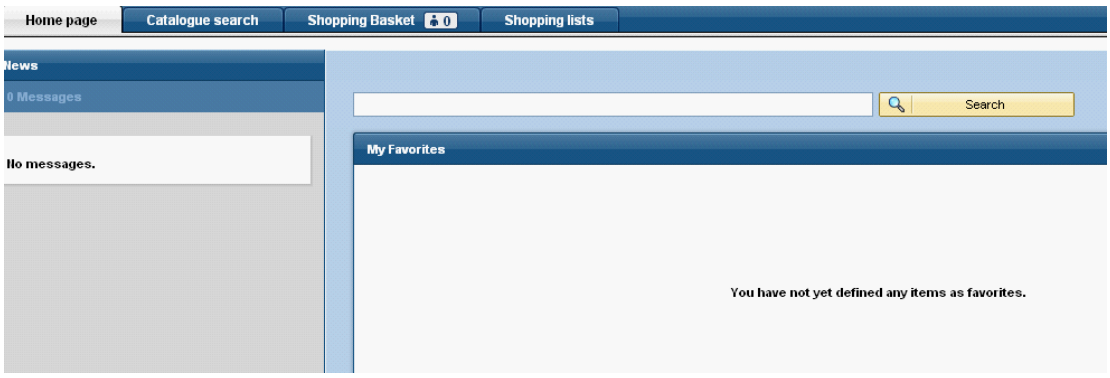
This section describes how to work with your favourite items.
Your Favourite items are available as a list on your Home page. You use favourites to add items you order frequently.

### Adding to Favourites

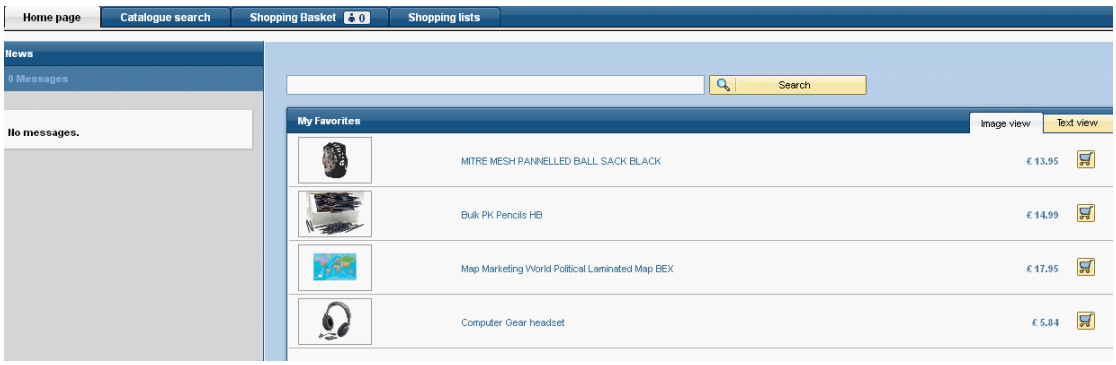
The following steps describe how you add and work with favourites:

**1. You can add to your favourites whenever you see this icon:**

**2. The Home Page Favourites List**
Favourites are shown on the landing page of the Procserve Catalogue System.




The Home Page will always display **You have not yet defined any items as your favourites** until an item is added:




**3. The following describes how you work with the Home Page Favourites List:**

• **Image View and Text View**. You can switch between a view that includes the item images and a text view. The image view is shown in the above image. Text view does not show any images:

### Image View

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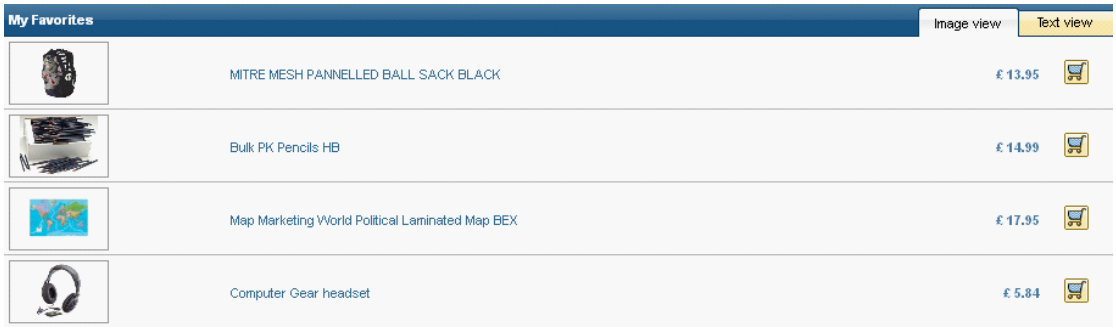
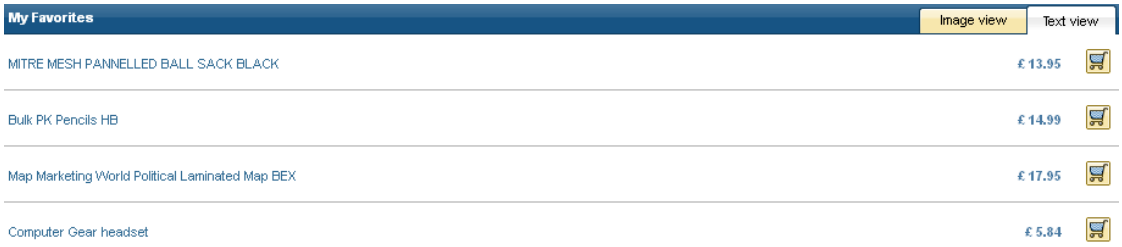
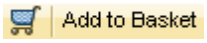



**Text View**



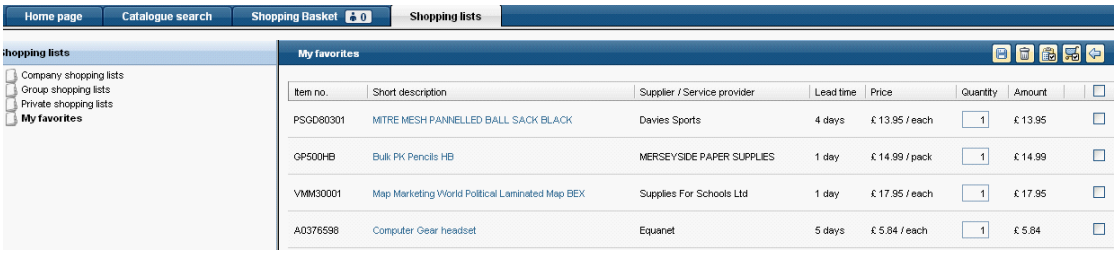

• **Item Details**. Click an Item description to view the Item details.

• **Add Item to Shopping Cart**. Click this icon 

to add the item to your Shopping Cart.

**4. Working With Your Favourites List.**
You can delete items, add multiple items to the Shopping Cart or add items to a Shopping List using the Favourites List within the Shopping Lists tab.

**5. In the Catalogue navigate Shopping Lists >> My Favourites:**




**6. The following list describes how you work with the Favourites:**

• **Update Quantity**. You can change the Quantity for an item and click the Save icon (see below). The new quantity is saved for later use. You can also update the quantity prior to adding to your Shopping Cart.

• **Mark Item**. To mark an item for deletion or adding to a Shopping List or cart you check the box in the right hand column. You can mark as many items as you like.

| | | |
|---|---|---|
| **Save Changes** | | Save changes to your Favourites. |
| **Delete Items** | | Delete items that have a Tick in the checkbox from your Favourites. |
| **Add to Shopping List** | | You can add all the checked items to a Shopping List |

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| | | |
|---|---|---|
| | | which you can change and re-use later |
| **Add Item(s) to Cart** | | Check each item to be added to your cart and click the multiple Shopping Cart icon |

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# 3.10 Working with Shopping Lists

### Overview

This section describes how to work with your Shopping Lists.

A Shopping List allows you to save items so that you can quickly create a requisition at a later date. For example, if you create a monthly artistic supplies requisition you can save all the items in a Shopping List, add to the shopping cart and then review and send the requisition.

### Adding Items to Your Shopping Lists

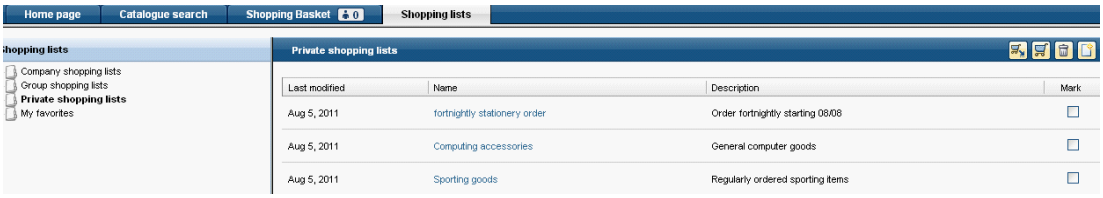
**1. Whilst shopping you can add to your Shopping List by clicking this icon** .

**The following list describes how to use this page:**

| | | |
|---|---|---|
| **Create New Shopping List** | | To create a new Shopping List enter a name and description in the relevant fields. The new Shopping List is displayed. |
| **Add to Shopping List** | | Add the items to the relevant Shopping List. The existing Shopping List is displayed with item(s) added. |
| **Back Icon** | | Return to the previous page. Changes are not saved. |

**2. Locating your Shopping Lists:**

Click Shopping Lists tab:




**3. About the Shopping List Page**.
The following list describes the Shopping List:

| | |
|---|---|
| **Company Shopping List** | These are for use throughout the organisation.<br>**Note**: Only catalogue administrators can create, edit and delete these lists. |
| **Group Shopping List** | These are for use by groups of users.<br>**Note**: Only authorised employees can create and change these lists. |
| **Private Shopping List** | These are shopping lists you create for your own use.<br>**Note**: Only you can create and change these lists. |

**4. Working with Shopping Lists**.
The following list describes how you work with shopping lists:

| | | |
|---|---|---|
| **Open Shopping List** | | You can click the Name link for a Shopping List to |

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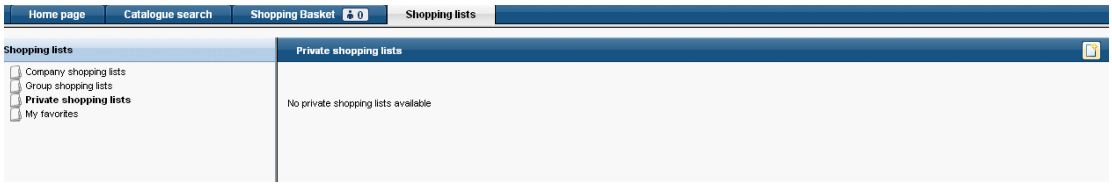
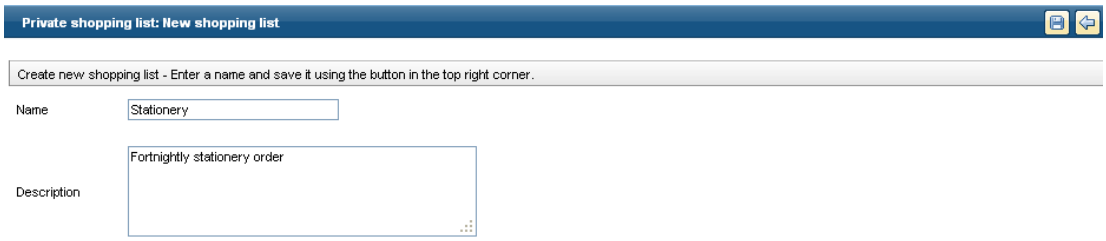
| | | |
|---|---|---|
| | | display the items |
| **Marking Shopping List** | | You mark an item by checking the relevant Mark box in the right hand column. |
| **Replace Shopping Cart with Marked Items** | | Replace the entire Shopping Cart with all marked Shopping Lists. |
| **Add Marked Shopping Lists to Shopping Cart** | | Add the all items from all marked Shopping Lists to your current Shopping Cart. |
| **Delete Marked Shopping Lists** | | Delete all marked Shopping Lists. A prompt is displayed. Click the OK button to delete the marked Shopping Lists. |
| **Create Shopping List** | | Create an empty Shopping List for future use |

**5. Create New Shopping List**
You can create an empty Shopping List for future use. Click this icon to display these fields:




Where you can then enter the Shopping List details:


Private shopping list: New shopping list
Create new shopping list - Enter a name and save it using the button in the top right corner.
Name
Stationery
Description
Fortnightly stationery order

The following list describes how you work with the create Shopping List page:

| | |
|---|---|
| **Name** | Enter a name for the new Shopping List. |
| **Description** | Enter a description for the new Shopping List. |
| **Save Icon** | Click the Save icon to validate, and if valid, save the new Shopping List. |

There are no items in this new Shopping List. You will need to add items to this Shopping List if you wish to use it.

**6. Working with Shopping List Items.**
When you click on the name link for a Shopping List the contents of the list are displayed:

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| Item no. | Short description | Supplier / Service provider | Lead time | Price | Quantity | Amount | |
|---|---|---|---|---|---|---|---|
| VRX13485 | Rexel Agenda2 Stationery Sorter Charcoal 2101037 | Supplies For Schools Ltd | 1 day | £ 10.13 / each | 1 | £ 10.13 | ☐ |
| WX21718 | Gel Pens Red | MERSEYSIDE PAPER SUPPLIES | 1 day | £ 2.95 / pack | 1 | £ 2.95 | ☐ |
| WX26040 | Ball Pens Black | MERSEYSIDE PAPER SUPPLIES | 1 day | £ 1.98 / pack | 1 | £ 1.98 | ☐ |
| 012426 | 30CM WHITE RULERS PACK OF 100 | The Consortium for Purchasing and Distribution Ltd | 2 days | £ 12.99 / pack | 1 | £ 12.99 | ☐ |
| C20 | C20 Erasers | MERSEYSIDE PAPER SUPPLIES | 1 day | £ 2.25 / pack | 1 | £ 2.25 | ☐ |
| MYA3 | Mycopy A3 copier paper | MERSEYSIDE PAPER SUPPLIES | 1 day | £ 4.75 / ream | 1 | £ 4.75 | ☐ |

**The following list describes how you use the Shopping Items list page:**

| | |
|---|---|
| **Show Item Details** | You can click the Short Description for an item to view item details. |
| **Quantity** | You can change the quantity for an item. |
| **Marked Box** | Check the box for each item you to apply a particular action to (for example deletion or add to favourites). |
| **Save Changes** | Click this icon to save any changes to your Shopping List. |
| **Delete Selected Items** | Click this icon to delete all selected items. A prompt is displayed. Click the OK button to delete the selected items. Click the Cancel button to cancel the deletion |
| **Add Selected Items to Favourites** | Click this icon to add all selected items to your Favourites. |
| **Add Selected Items Shopping Cart** | Click this icon to add the all items from all marked Shopping Lists to your current Shopping Cart. |
| **Back Icon** | Click the Back icon to return to the Shopping Lists page. Changes are not saved |

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## 3.11 Double Punch-out Sites

**Overview**

Punch out means you can go to a suppliers eProcurement site, shop and bring your items back to your shopping cart.

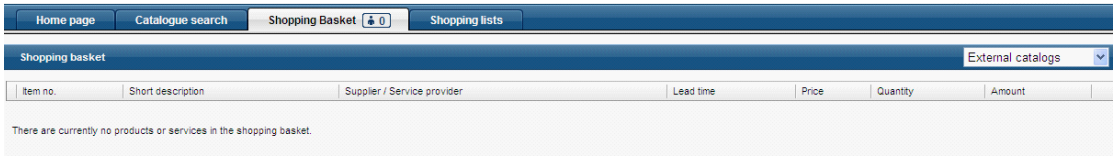
Whilst punch out sites can be provided for any Supplier they are commonly used when a standard catalogue may not be appropriate because of the need to personalise or configure a purchase e.g. a computer could be customised by adding extra memory or a larger hard disk.

**Locate and Open the Shopping Cart**

The following steps describe how you punch out to an external Supplier site from the Procserve Marketplace.

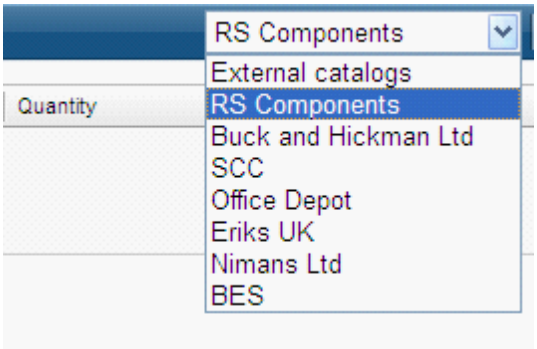
**1. Click the Shopping Cart tab**

**2. The Shopping Cart is displayed:**




**Note**: The above image shows an empty Shopping Cart. The cart could also have other items in it.

**3. The External Catalogues Drop Down**
Open the external catalogues drop-down list:




**4. Select one of the External Suppliers from the drop down.**

**5. The selected Suppliers website will open in a new window.**

**6. Shop online with this Supplier as you usually would.**

**7. When you have finished your external shopping you can checkout.**

**8. The items you chose are displayed in Shopping Cart.**

**9. You can continue to shop or work on your Shopping Cart.**

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# 4

# Catalogue Management

# 4 Catalogue Management

## 4.1 Catalogue Management Introduction

**Overview**

Suppliers can provide buying organisation's catalogues which allow buyers to easily search for and select items to add to requisitions.

Before a supplier is able to provide catalogue content, they must be invited to the Procserve Trading Network and be registered as a bronze supplier.

There are 3 different types of catalogues a buying organisation may have access to:

| | |
|---|---|
| **Single Buyer Catalogue** | Catalogue is for a single buying organisation only. |
| **Multi-Buyer Catalogue** | Catalogues can be shared amongst selected buying organisations. |
| **Public Catalogue** | Catalogues are made available to all buying organisations. This is only available to a few organisations and is not covered by the content of this manual. |

**Note:** Some of the sections within Catalogue Management may not be relevant to you dependant on your organisation set up.

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## 4.2 Accessing Catalogue Management

**Overview**

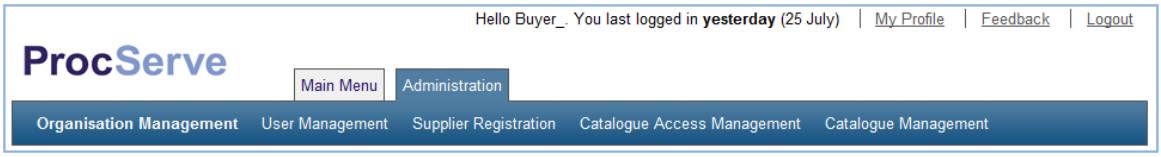
Within Catalogue Management you can upload and manage your catalogue content.

**Note:** Dependant on your community and organisation setup, some of the menus may appear in a different order.

**To access Catalogue Management**

**1. Login to Procserve Commerce Hub.**

**2. Click on 'Catalogue Management'**




A new window will open where you can administer catalogues as shown in the following sections.

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## 4.3 Hybrid Community Catalogue Initial Load

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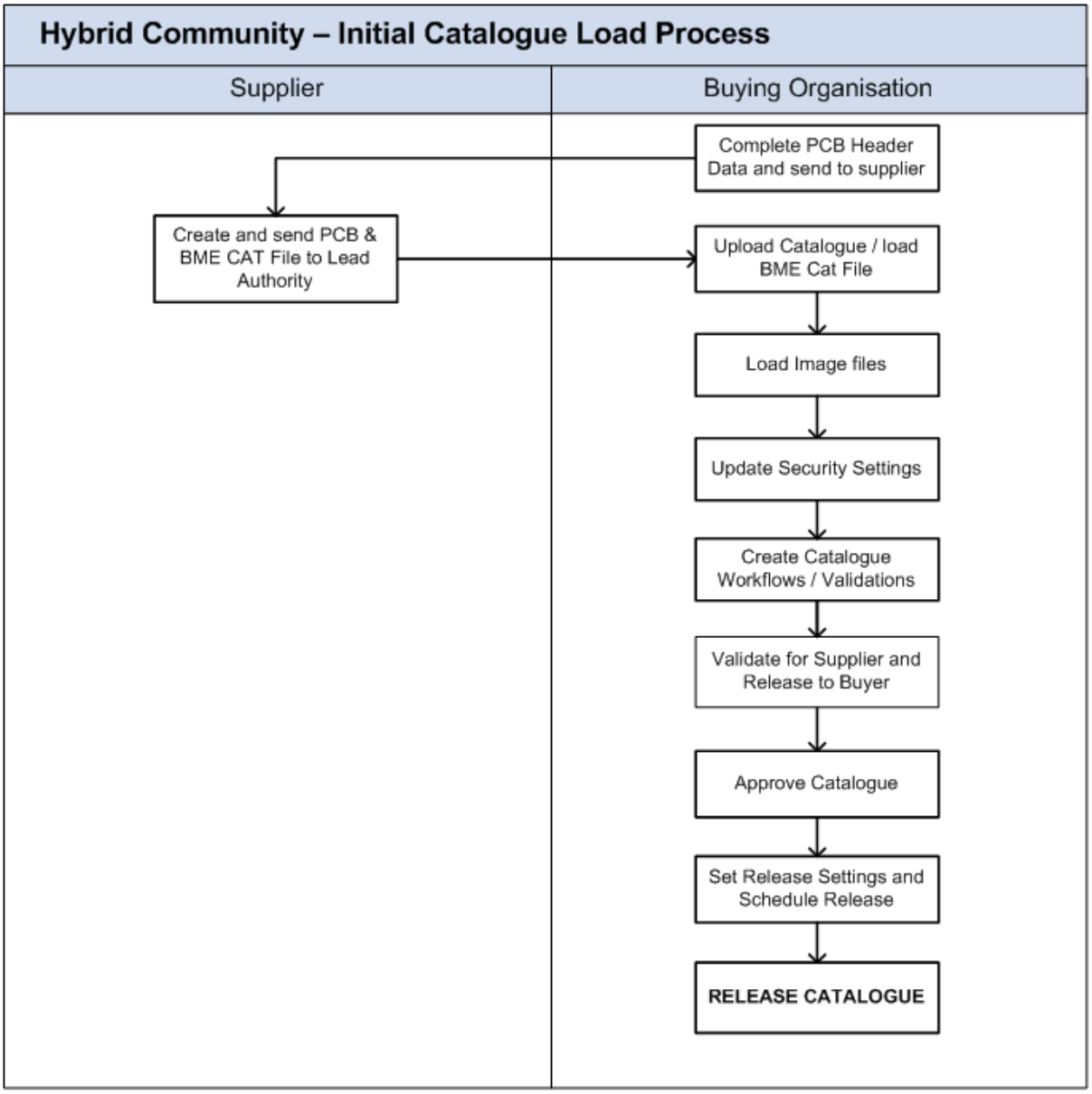
### 4.3.1 Overview

This section describes the process of loading and configuring a catalogue for a single buying organisation using the Catalogue Management.


Hybrid Community – Initial Catalogue Load Process
Supplier
Buying Organisation
Complete PCB Header Data and send to supplier
Create and send PCB & BME CAT File to Lead Authority
Upload Catalogue / load BME Cat File
Load Image files
Update Security Settings
Create Catalogue Workflows / Validations
Validate for Supplier and Release to Buyer
Approve Catalogue
Set Release Settings and Schedule Release
RELEASE CATALOGUE

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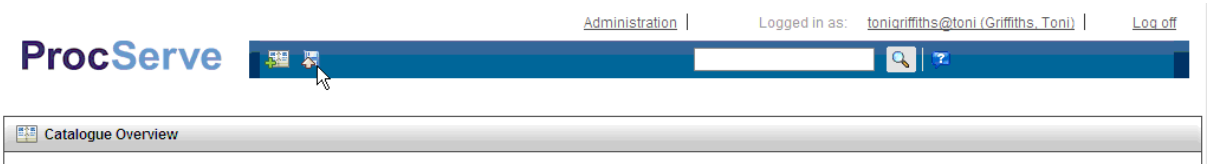
## 4.3.2 Importing The Catalogue

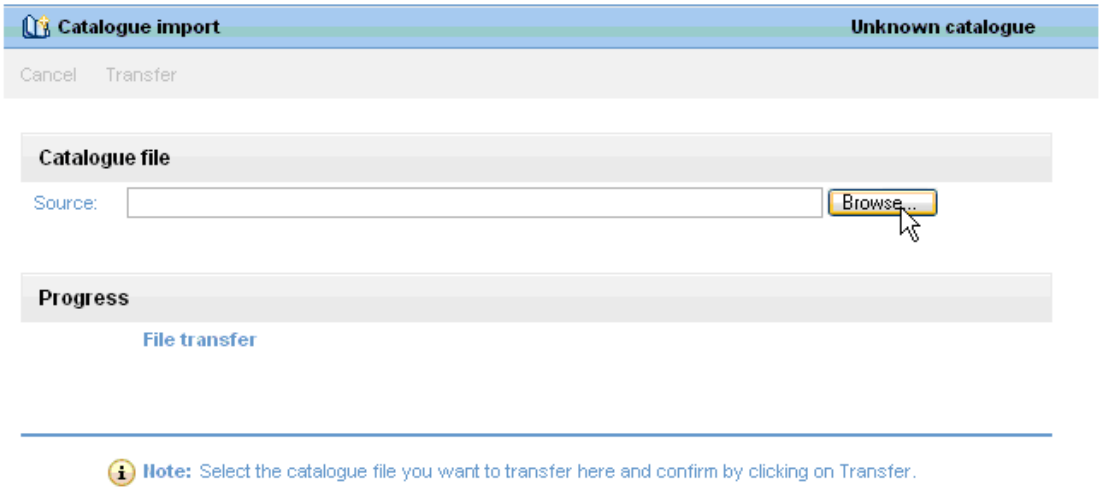
The following steps describe how you upload and configure a catalogue for the first time.

1. **Navigate Admin Menu >> Catalogue Management:**
   The catalogue manager is displayed.

2. **Click on Import Analysis:**




3. **Import the BMECat File:**
   In the Import Analysis page click the Browse button or enter a path and file name in the source field.
   **Note:** You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue.




4. **Click on Transfer in the top left corner:**

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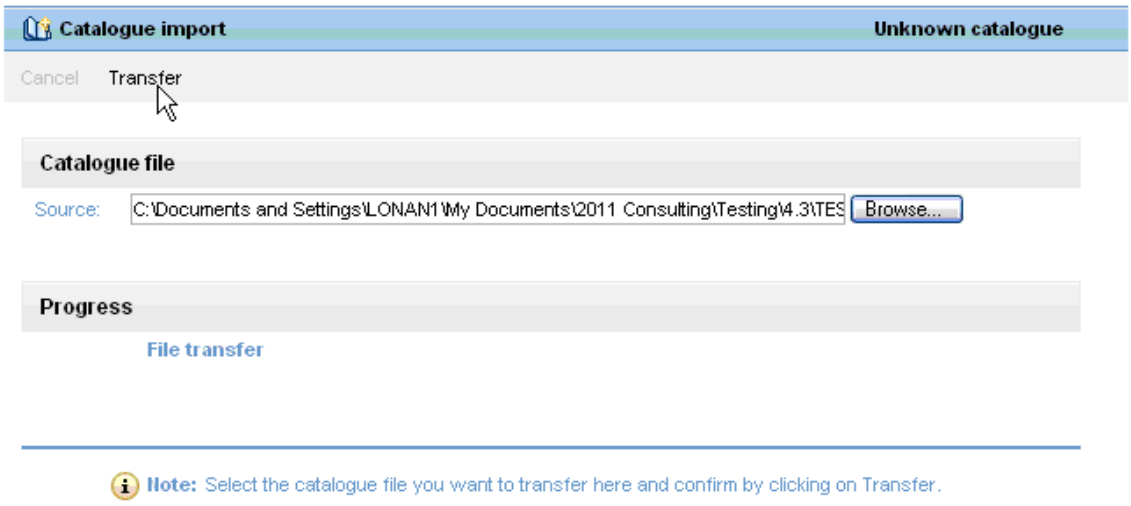
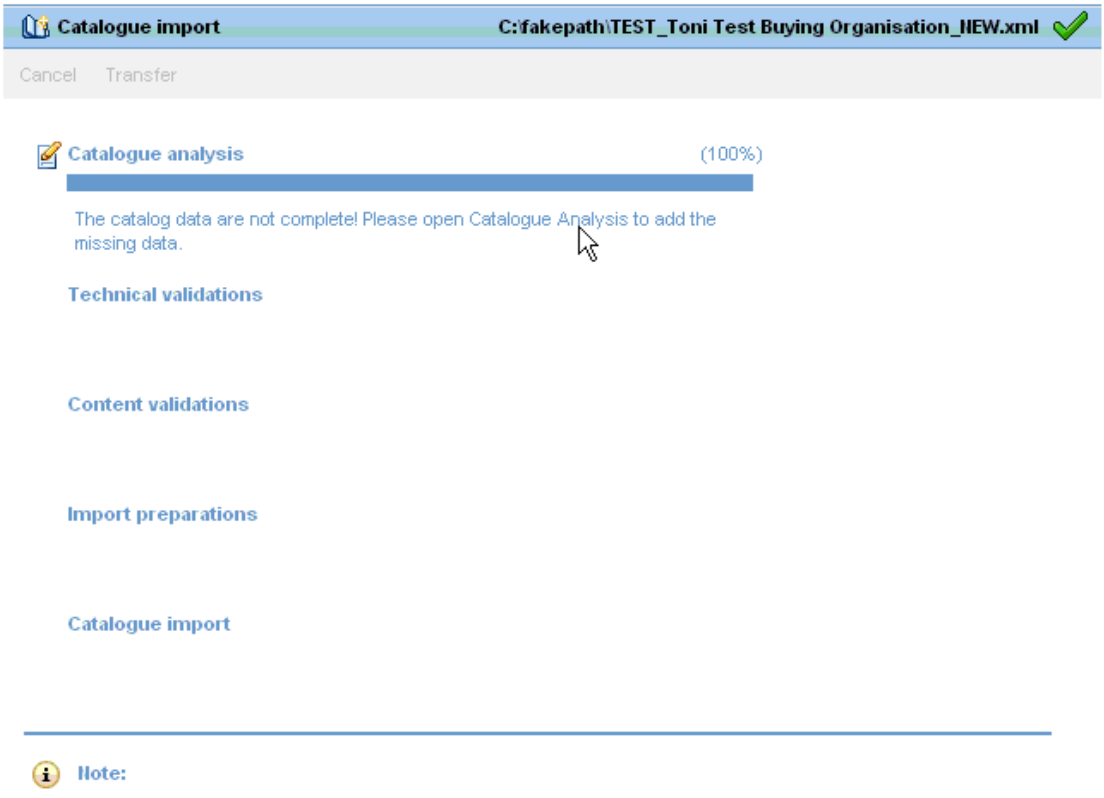



5. During the import process, catalogue manager will stop the import and you will be prompted to run a catalogue analysis.
   **Click on the catalogue analysis link:**




6. **Verify the details in the catalogue analysis pop up window:**

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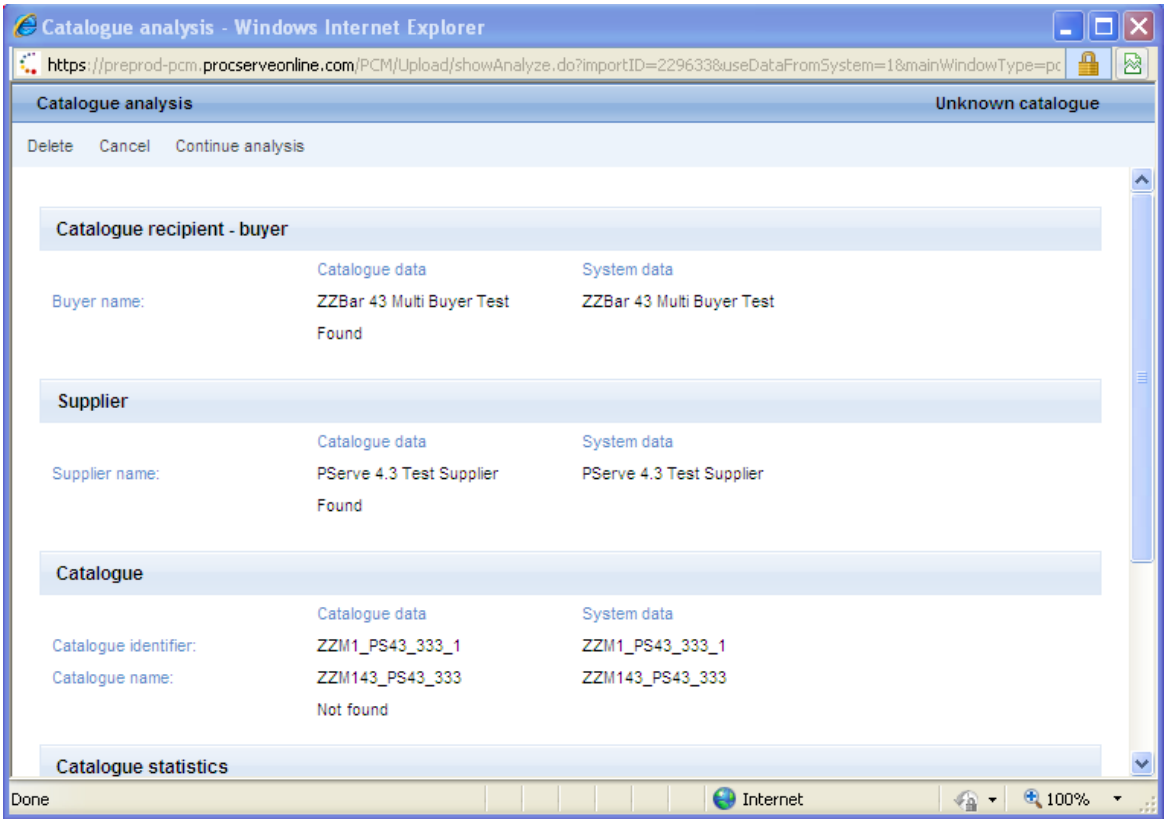


**Note:** Check the buyer and supplier are 'Found'. If not, click on cancel to exit the import and correct the errors in the Procserve Catalogue Builder and reload the file.
**Note:** The catalogue should be 'Not Found' which is correct as its a new catalogue.

7. **Click on Continue Import**

8. **Once the import is successfully completed the confirmation screen is displayed:**

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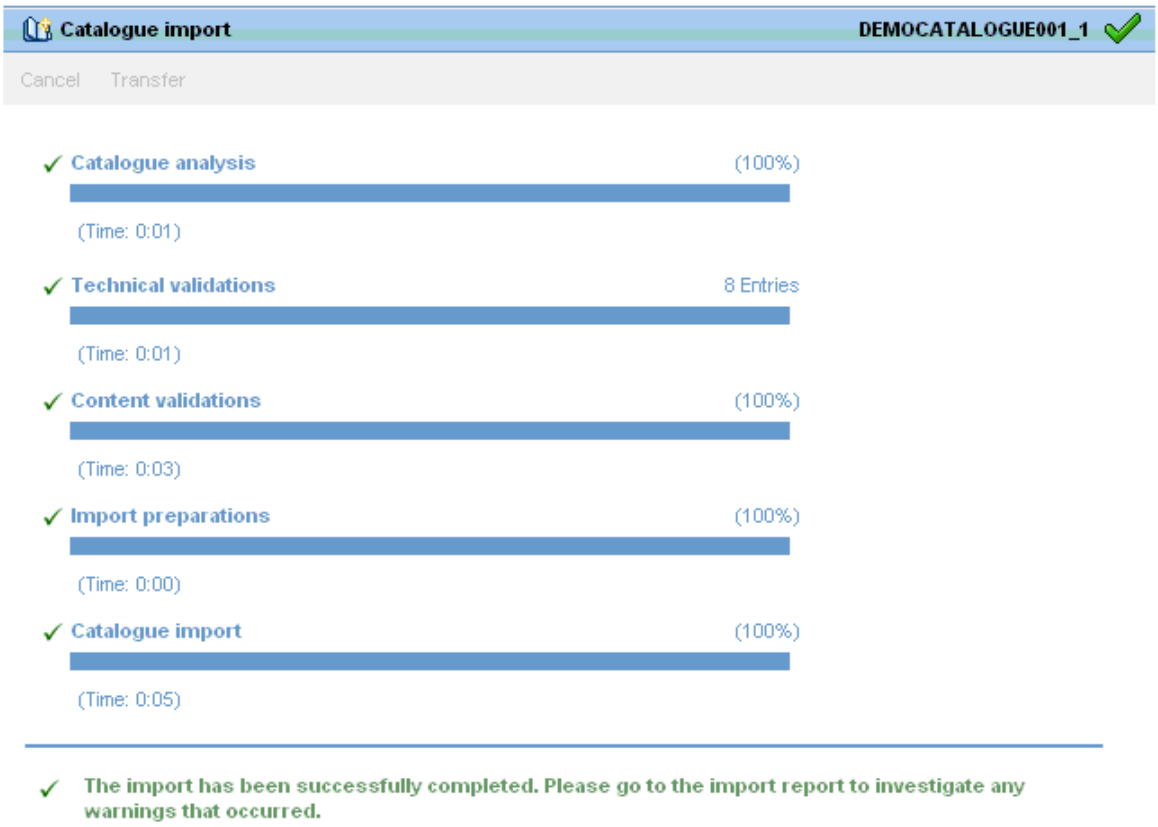
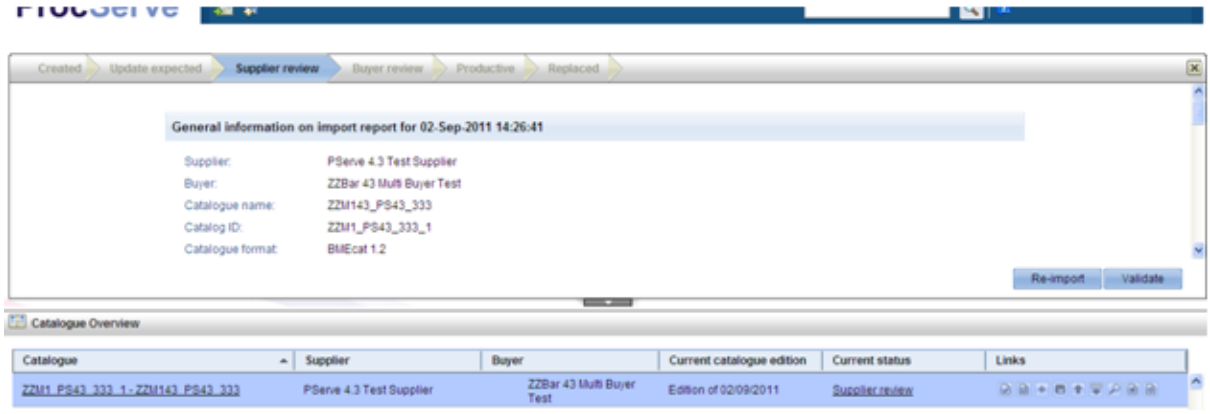



9. **Click on Close if visible at the bottom of the Catalogue Import screen or click outside the Catalogue Import screen.**

10. **The catalogue will now be in Supplier Review:**

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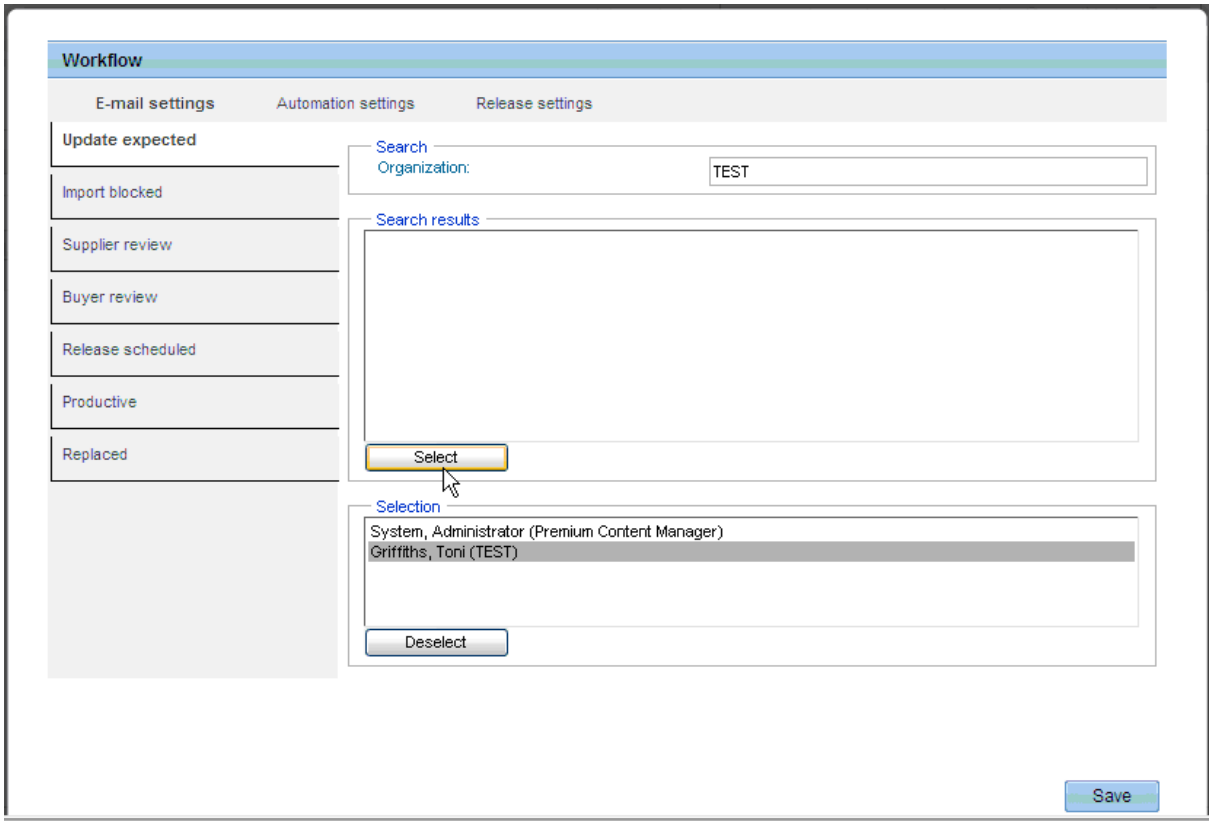
### 4.3.3 Configuring Catalogue Workflow

The workflow for the catalogue now needs to be configured to ensure that the necessary people from the buyer and supplier organisations are notified (by email) of catalogue changes and perform the appropriate administration duties for a particular catalogue. The workflow also determines if any steps are automated (for example supplier review in an initial load) as well as export options (such as scheduling).

**Note:** The person/people selected for each workflow step is used to trigger an email notification and to give permission to users to complete tasks.

1. Select the catalogue workflow option:

2. Set up the email settings as required. Search for the relevant hybrid community in the organization search field on the top right:




3. Click on the relevant users and click on the select button (repeat as necessary):

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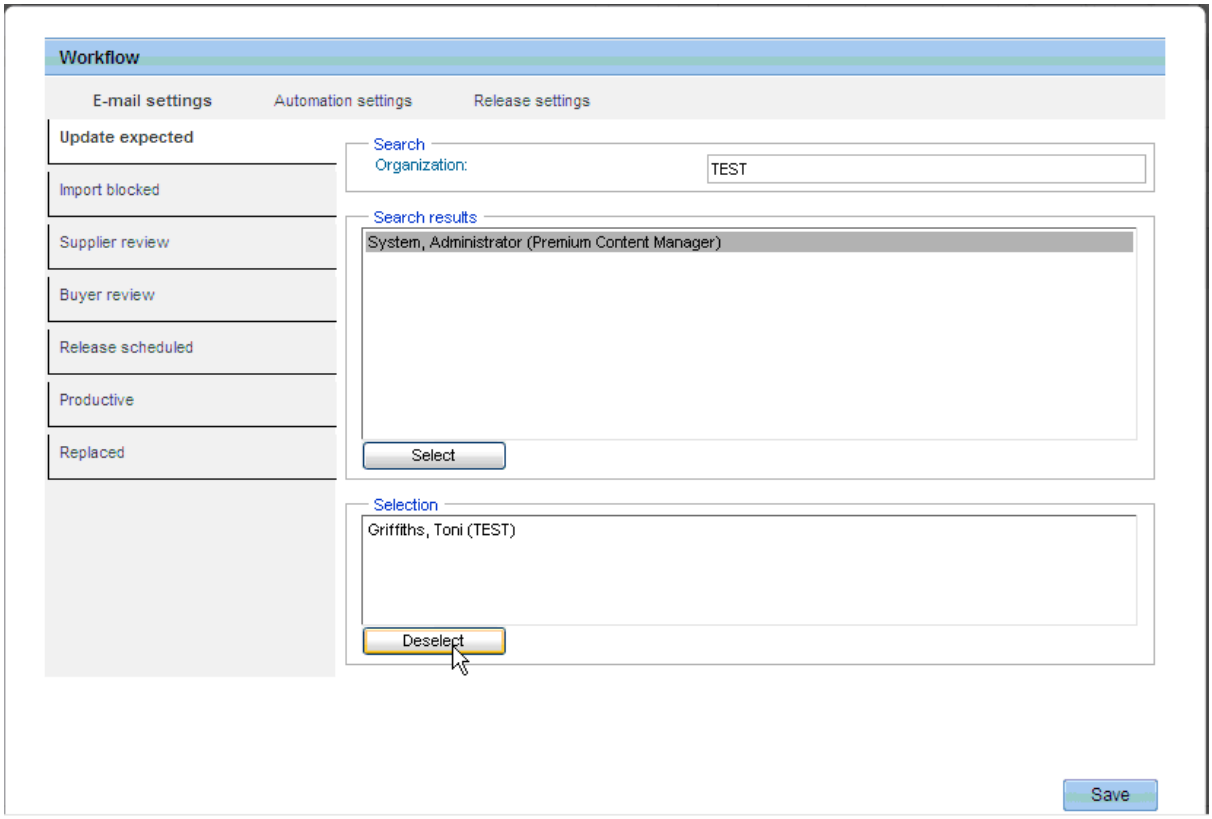
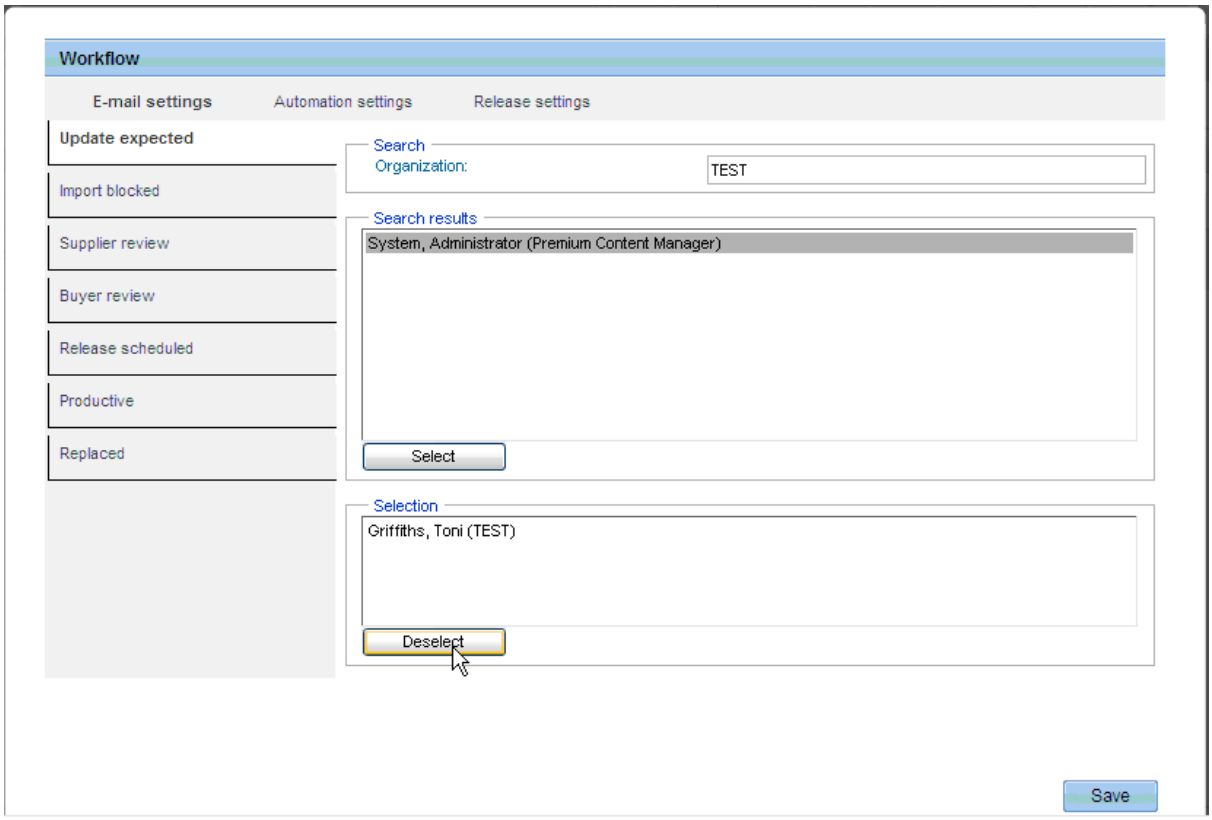



4. Click on any users within the selection that need to be removed and click on deselect (repeat as necessary):




You need to set users for the following sections:

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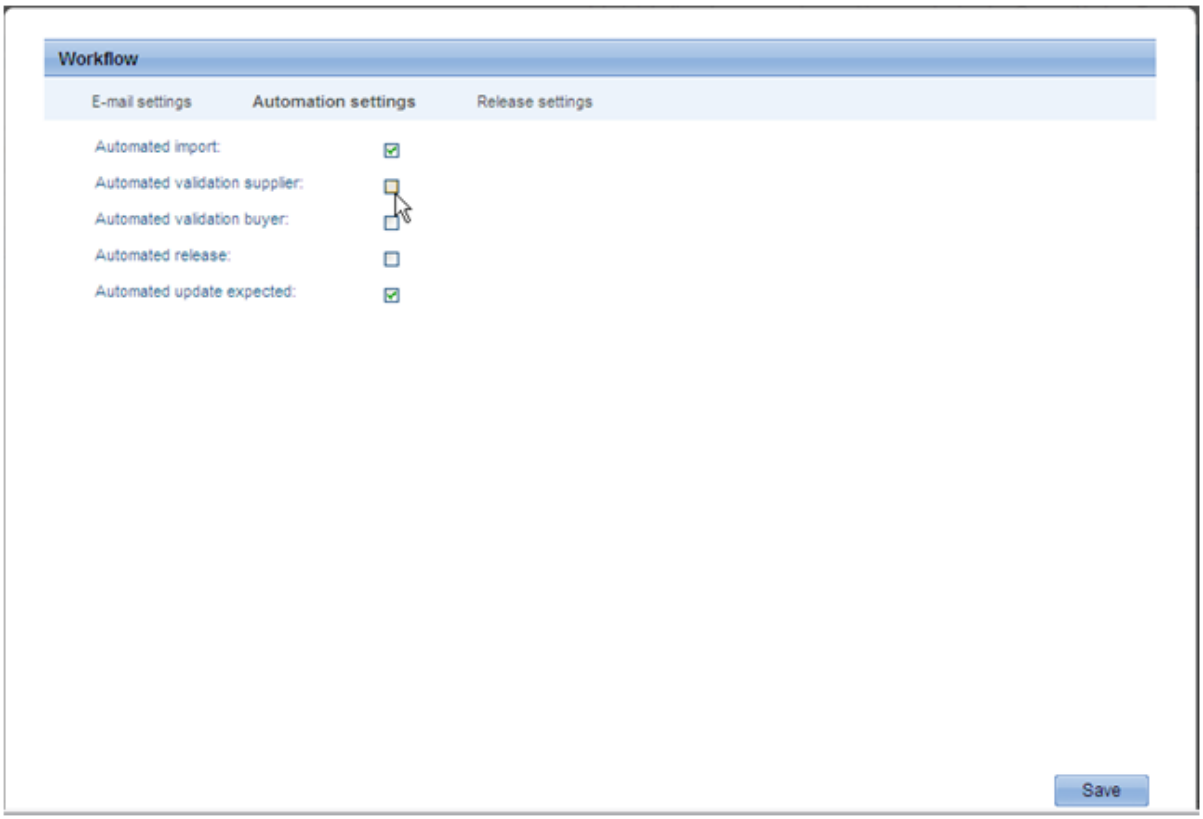
Update Expected (Supplier Super User)
Supplier Review (Supplier Super User)
Buyer Review (Buyer Super User)
Release Scheduled (Buyer Super User)

5. Ensure that the Automation settings are set as required (Click on Automation Settings)




**Note:** Suggested setting for standard catalogue is to deselect Automated validation supplier to enable Supplier Review status on subsequent loads

6. Check release settings are as required:

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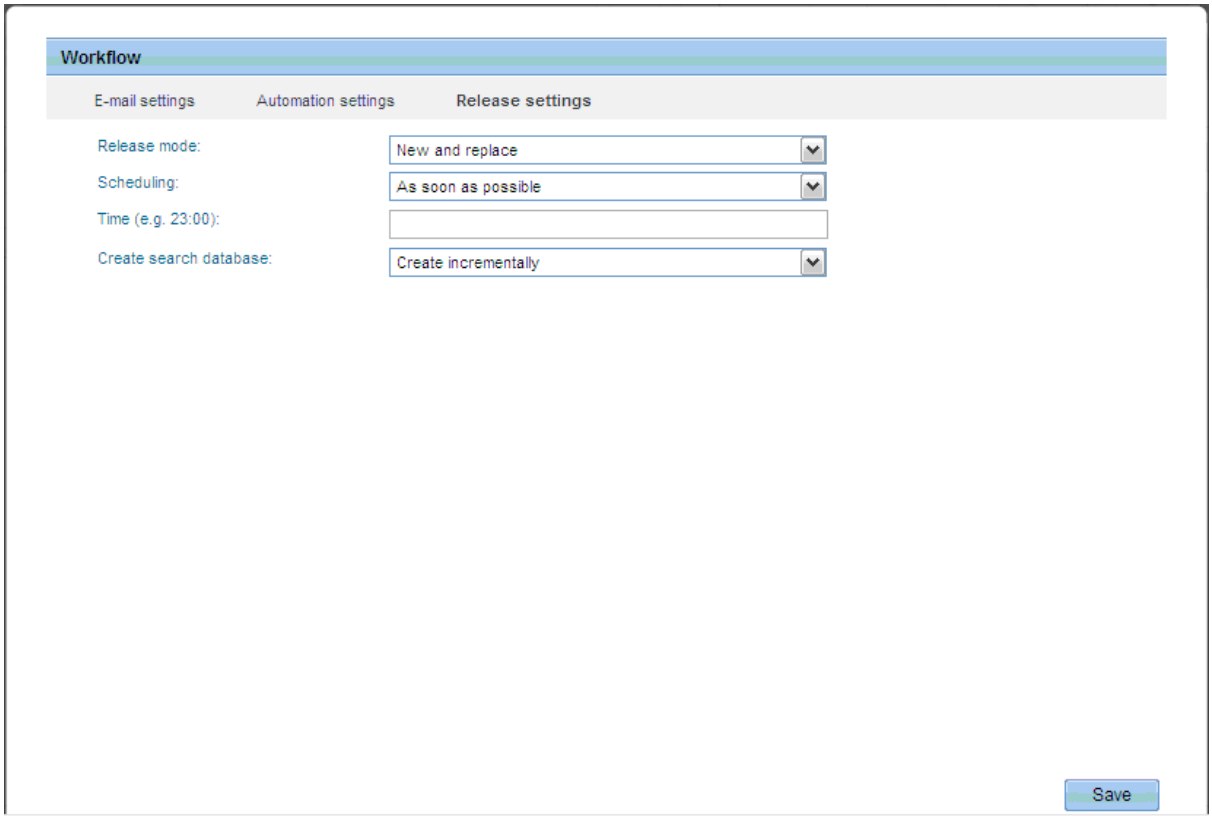


7. Click on Save
8. Click on close or click outside of the catalogue
9. Next click on the Catalogue Properties option

10. Click on the Edition & Version tab and change the Catalogue Status to Update Expected.

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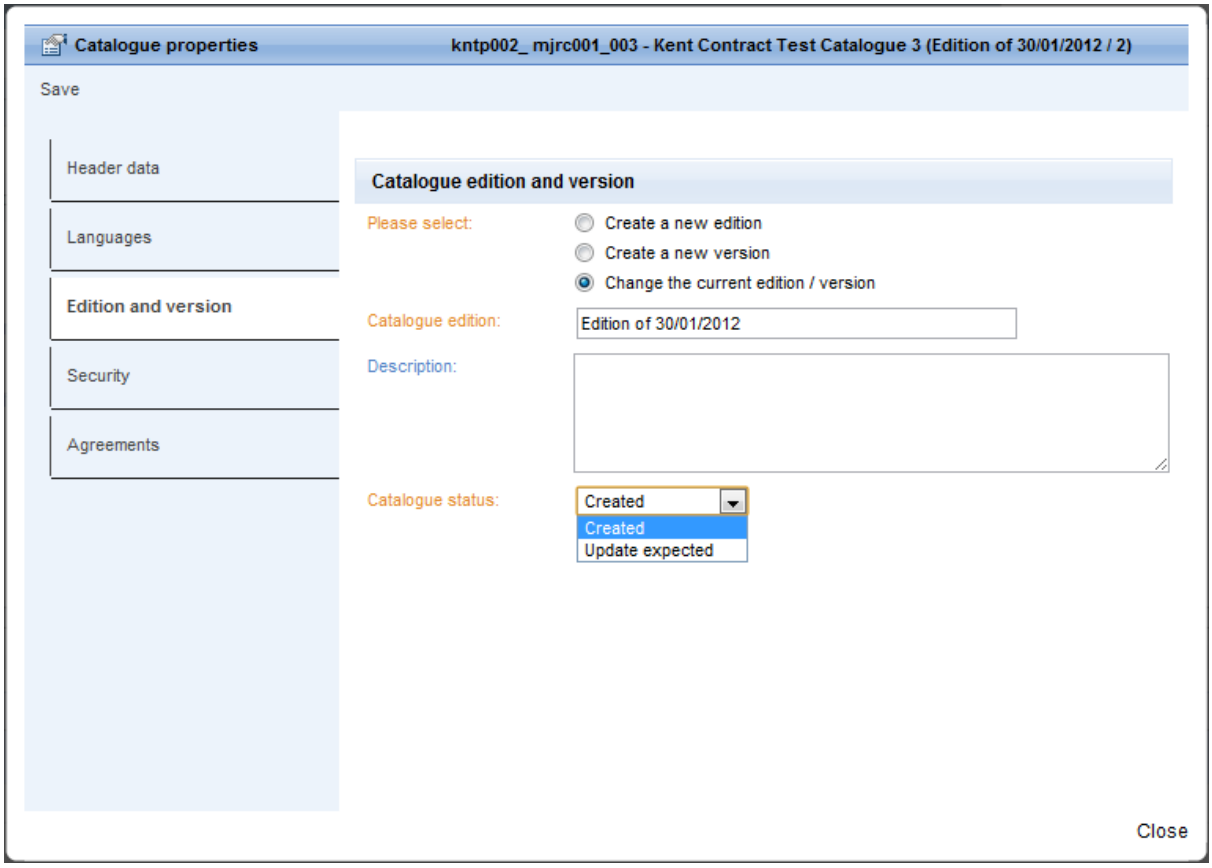
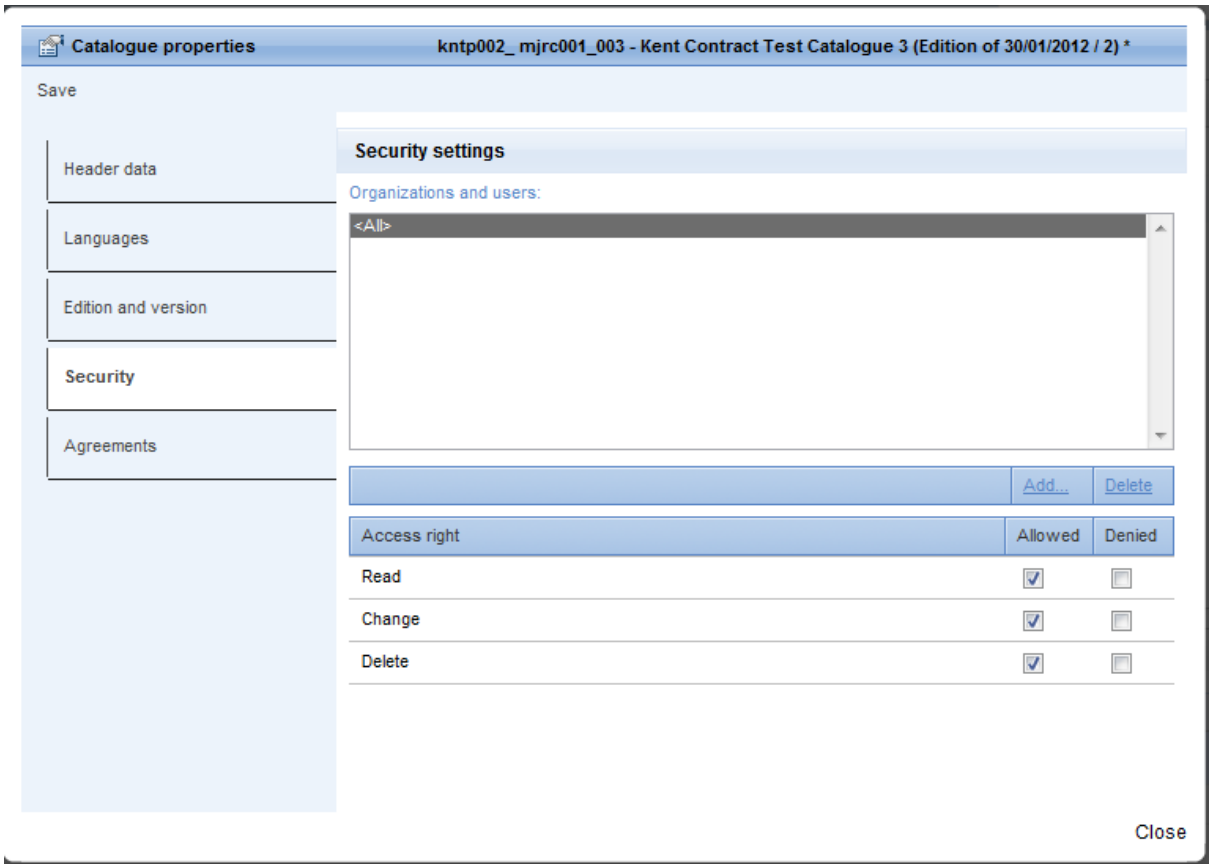



11. Now click on the Security tab and click on Add.

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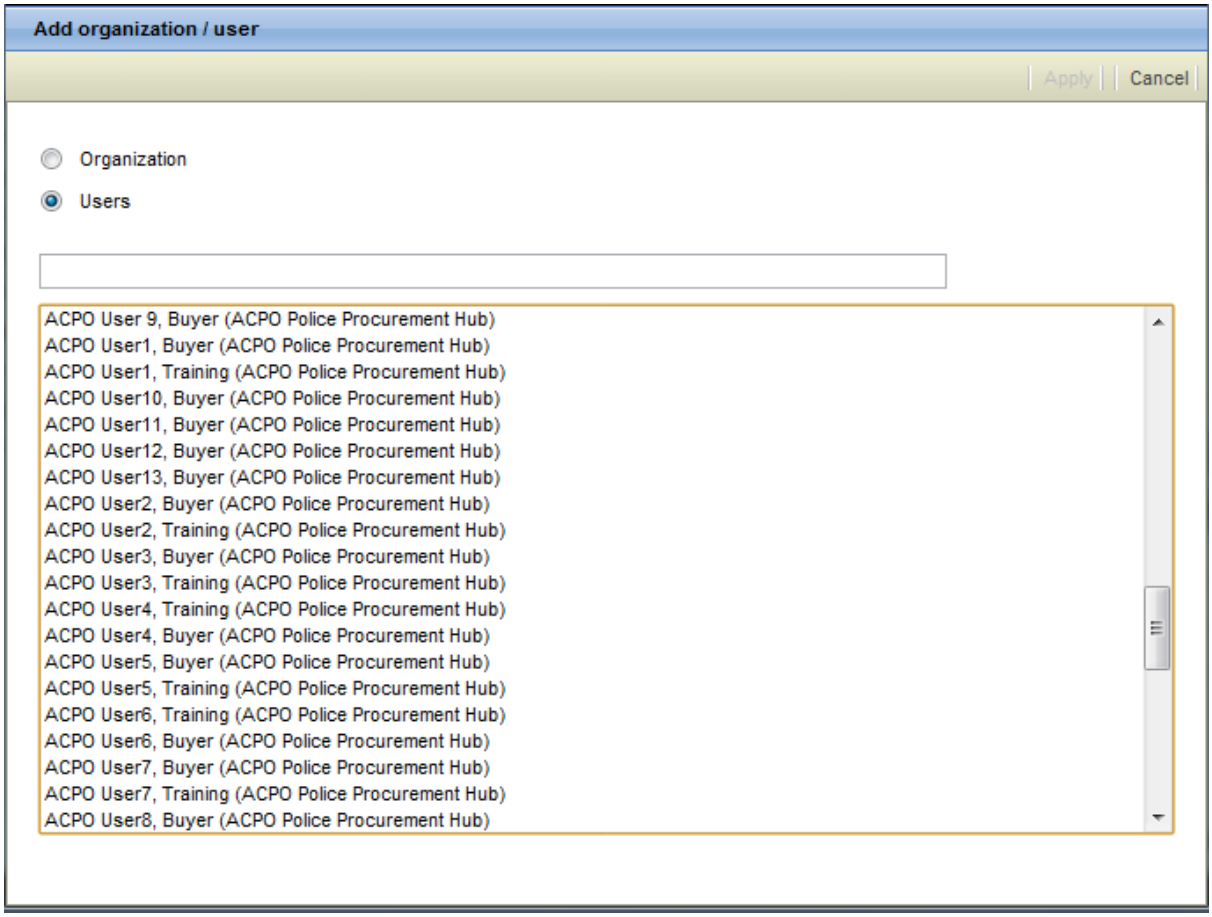
12. Add the users that need to be notified during the catalogue loading process. When you have selected all the required users click on the Apply button in the top right hand corner of the Add Organization/User window.

**Note:** Ensure that once the users have been added that you set the Access rights as required as per the above screenshot.


Add organization / user
Apply
Cancel
Organization
Users
ACPO User 9, Buyer (ACPO Police Procurement Hub)
ACPO User1, Buyer (ACPO Police Procurement Hub)
ACPO User1, Training (ACPO Police Procurement Hub)
ACPO User10, Buyer (ACPO Police Procurement Hub)
ACPO User11, Buyer (ACPO Police Procurement Hub)
ACPO User12, Buyer (ACPO Police Procurement Hub)
ACPO User13, Buyer (ACPO Police Procurement Hub)
ACPO User2, Buyer (ACPO Police Procurement Hub)
ACPO User2, Training (ACPO Police Procurement Hub)
ACPO User3, Buyer (ACPO Police Procurement Hub)
ACPO User3, Training (ACPO Police Procurement Hub)
ACPO User4, Training (ACPO Police Procurement Hub)
ACPO User4, Buyer (ACPO Police Procurement Hub)
ACPO User5, Buyer (ACPO Police Procurement Hub)
ACPO User5, Training (ACPO Police Procurement Hub)
ACPO User6, Training (ACPO Police Procurement Hub)
ACPO User6, Buyer (ACPO Police Procurement Hub)
ACPO User7, Buyer (ACPO Police Procurement Hub)
ACPO User7, Training (ACPO Police Procurement Hub)
ACPO User8, Buyer (ACPO Police Procurement Hub)

13. When you have made all the required changes to users and access rights, select the <All> group and click on the delete button. Next click on the save button in the top left of the Catalogue Properties window.

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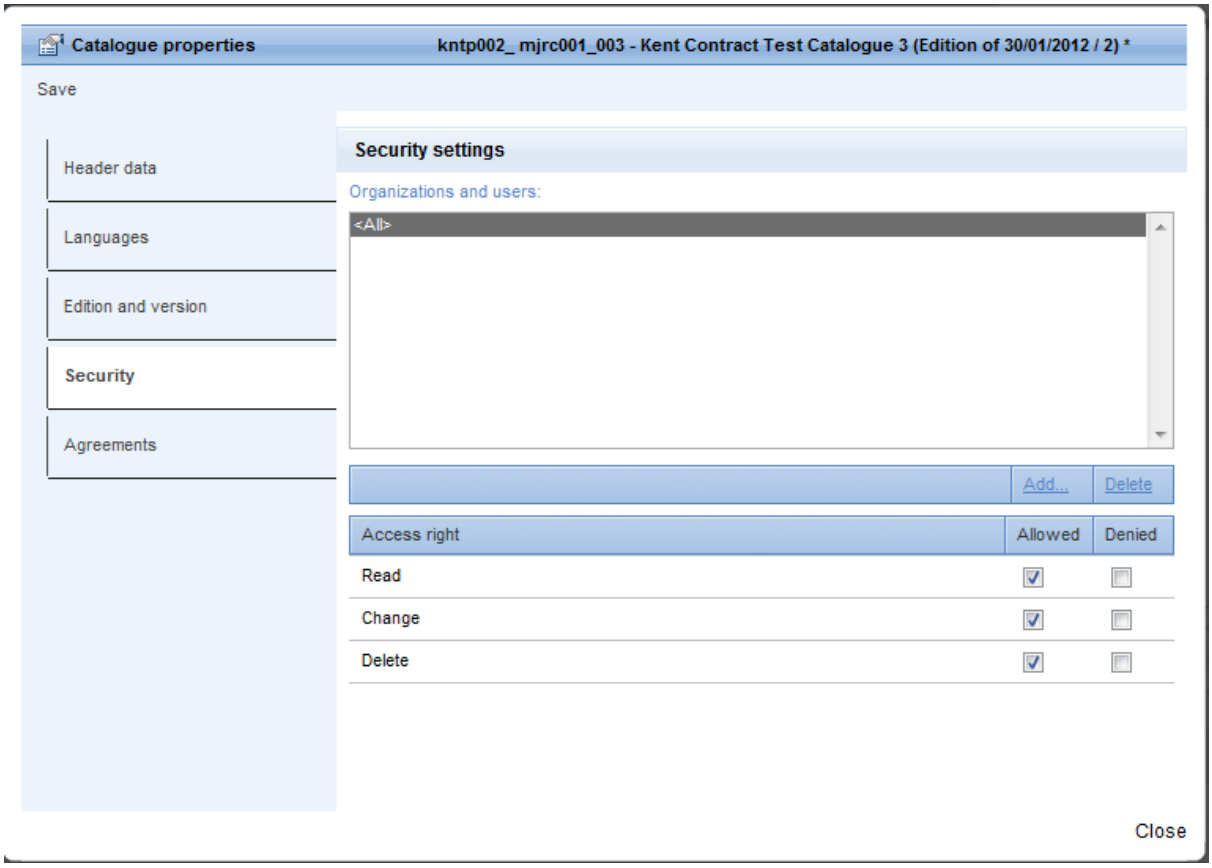
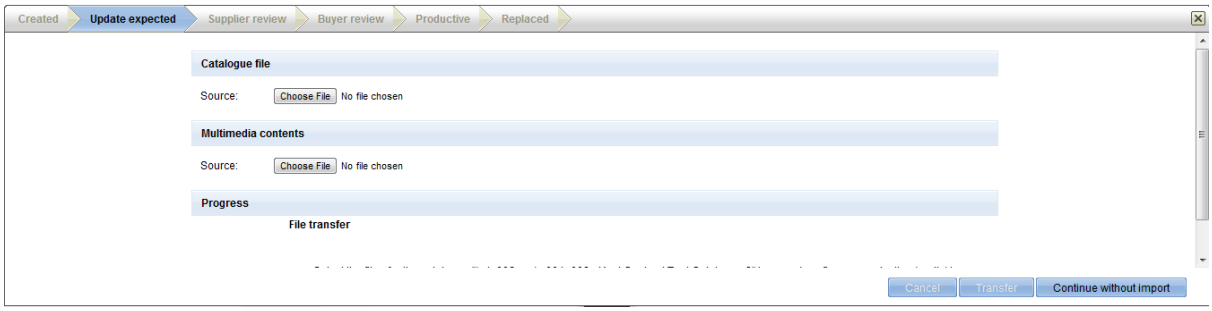
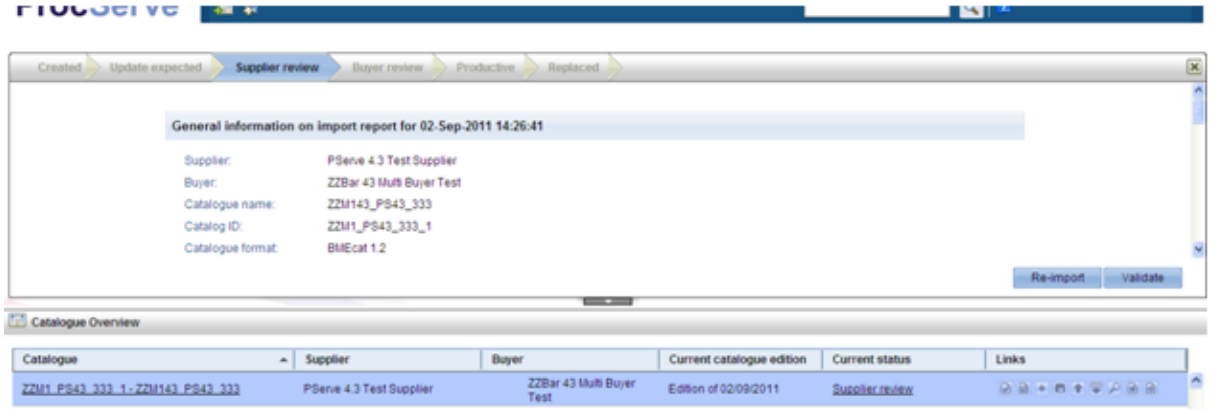



14. The catalogue should now have a status of Update Expected. Click on the catalogue to show the catalogue details in the top pane and click on the Continue without import button.




15. The catalogue should now have a status of Supplier Review

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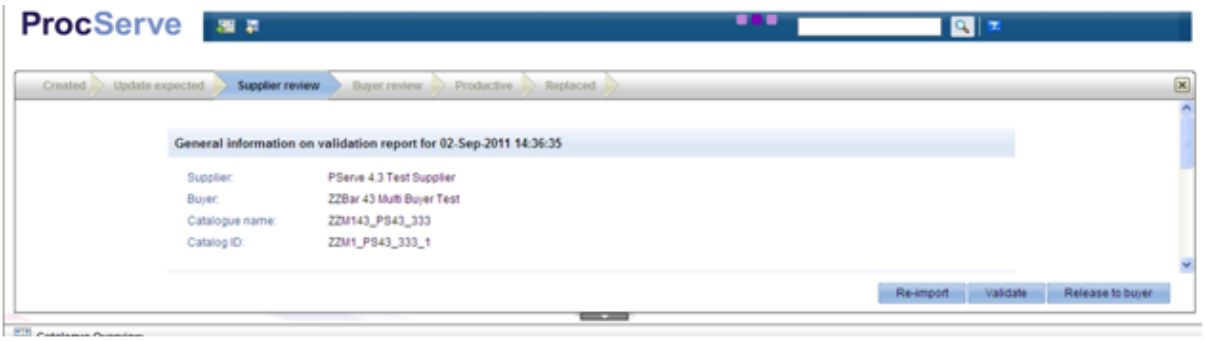
16. Select Validate to run the validation report and then select Release to Buyer.




17. The catalogue will now be in Buyer Review:

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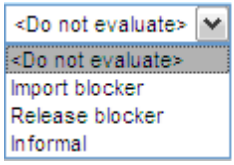
## 4.3.4 Validating Your Catalogue

The catalogue will automatically inherit the standard validation that has been defined for all catalogues in your organisation. You are able to change the validations against a specific catalogue if you wish.

1. Amending the validation profile from your standard profile

Select the validation profile icon for your catalogue

To change the evaluation against a rule, select an option from the drop down list (options vary depending on the type of rule):



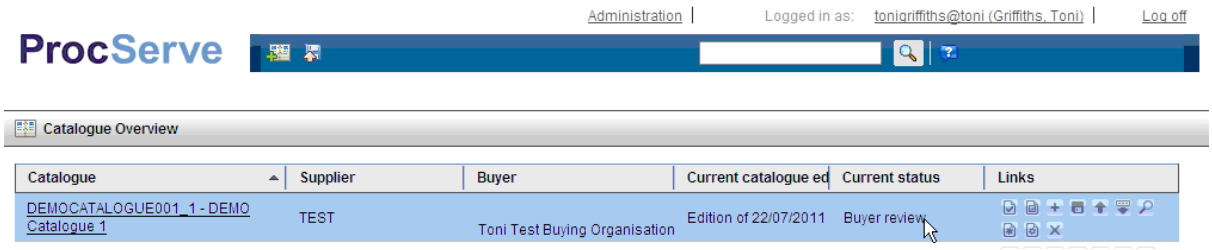

To add a rule, select a similar rule and click on the "Create a new rule based on this rule" icon

Change the required details and click on save.

**Tip:** Ensure you give the rule a meaningful name so that others can recognise what that rule checks for.

**Tip:** Do not amend rules as this amends the rule for all catalogues and organisations on the system.

2. Click on the Buyer Review status link for the catalogue:




3. Select Validate to validate the catalogue against the validation rules set for this catalogue:

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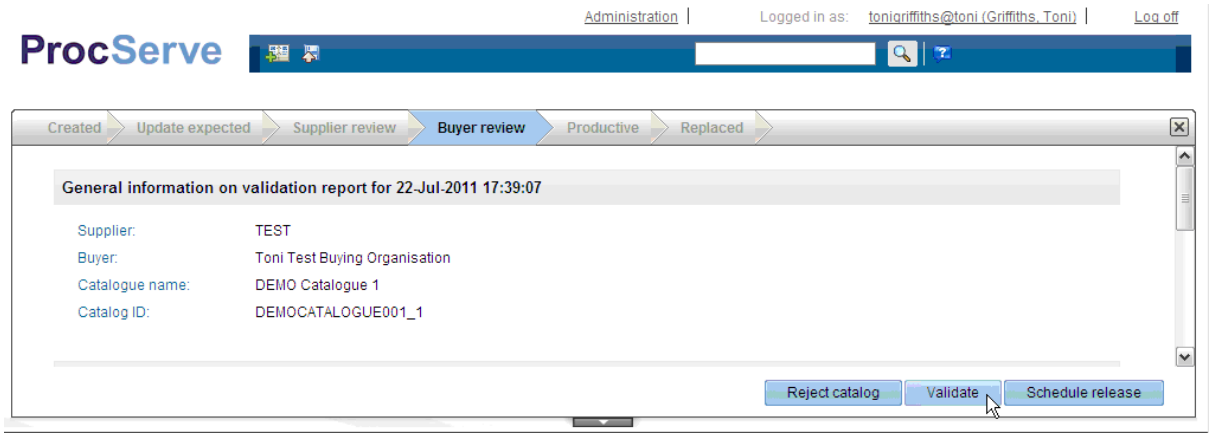


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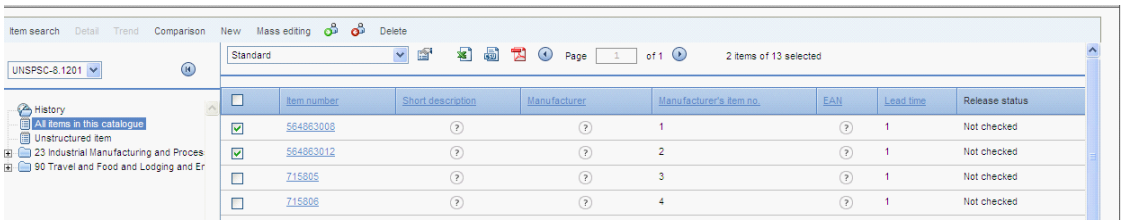
## 4.3.5 Approving Your Catalogue

To approve the items in your catalogue you will need to approve them in Catalogue Explorer.

**1. Select Catalogue Explorer icon to review the catalogue items**

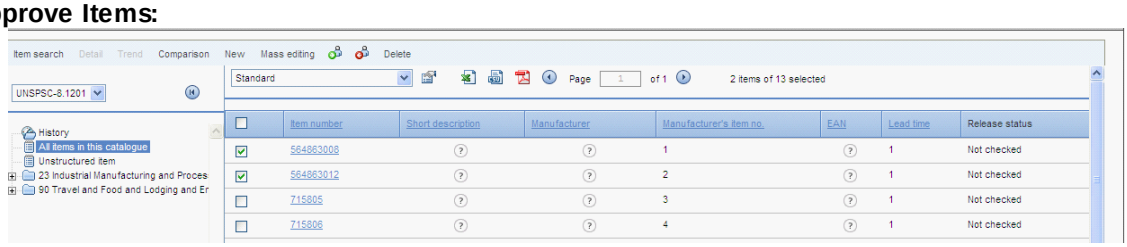



**2. You can now approve and/or reject the items loaded:**
Select items by ticking the item box(es). To select all, tick the box above the items. The release status for each item is 'Not Checked'. You can now inspect each item and reject or approve them or you can approve them all immediately as described below.

To reject an item check the relevant left hand column and click the Reject icon to the top right of the page. The item is now marked for rejection.

**Note:** You will need to contact your supplier stating the reason why the items were rejected so they can amend their items in the catalogue and resubmit them to the buying organisation to load and/or approve as required.

**Approve Items:**




When you are sure that an item is correct, you can check the relevant items and click the Approve icon to the top right of the page.

**Tip**: If you wish to view an item's detail, click the Item number link to display the item details.

**Tip**: You can approve items one at a time or you can click the left hand column heading box to select all items.

**Note:** If changes are required then you can both amend through the Procserve Catalogue Manager Catalogue explorer interface, or via the Procserve Catalogue Builder and re-import the file.

**Note**: Any new file imported will over write the old data where the header data is the same.

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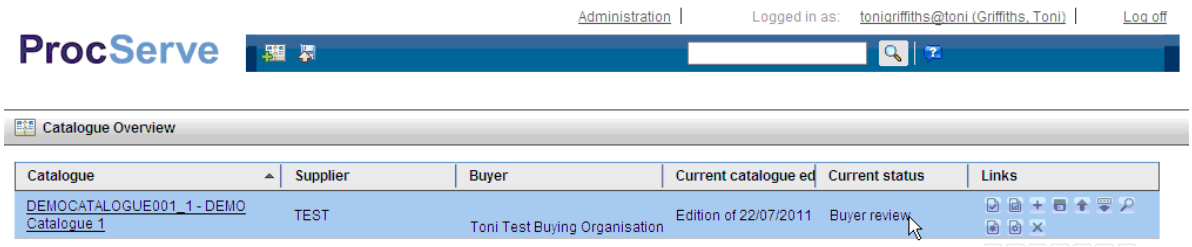
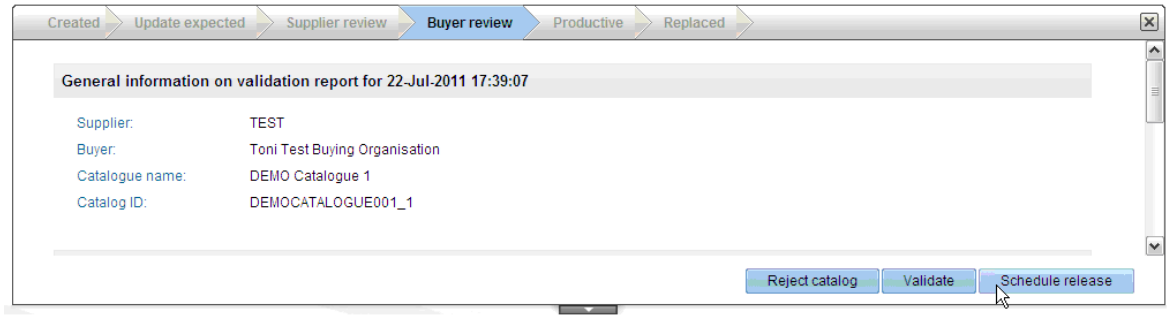
## 4.3.6 Exporting Your Catalogue

You can now release your catalogue.

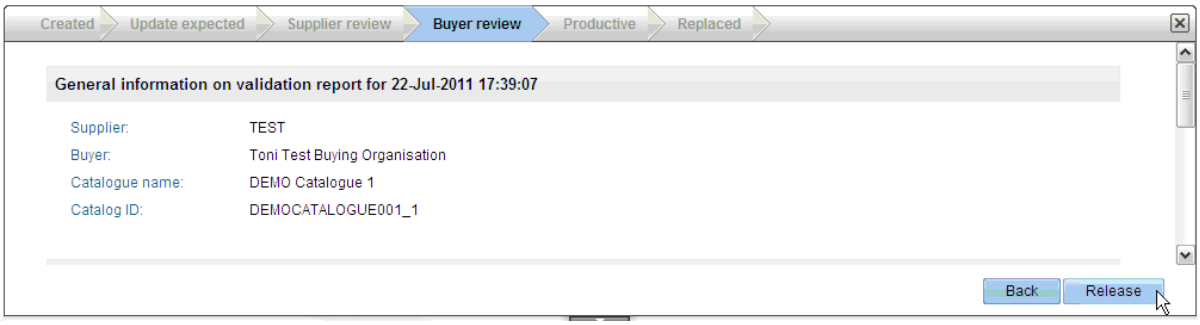
**1. Click on the Buyer Review link for the catalogue**




**2. You can now select 'Schedule Release'**




**3. Then click on 'Release' to export the Catalogue**




The catalogue will now be scheduled for release or released immediately according to the release settings configured for this catalogue.

The catalogue Status will now change to 'Update Expected'.

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# 5
# Additional Information

# 5 Additional Information

## 5.1 About DUNS

A DUNS Number is a nine-digit code assigned by Dun & Bradstreet to identify unique business's separate and distinct operations.

There is no charge to obtain a D&B DUNS number for your business and it can make it easier for your customers to do business with you.

You can apply for a unique DUNS number on the Dun & Bradstreet website at: http://dbuk.dnb.com/Forms/DUNS_Request.asp

If you do not have one central sales order processing site, you will need to obtain a separate DUNS number for each ordering location. In this event, and to avoid misunderstanding, please check with your head office to determine which, (if any), DUNS number may have already been allocated.

The process for application to Dun & Bradstreet should take no longer than two weeks. You may wish to apply now if your Organisation does not already have a DUNS Number.

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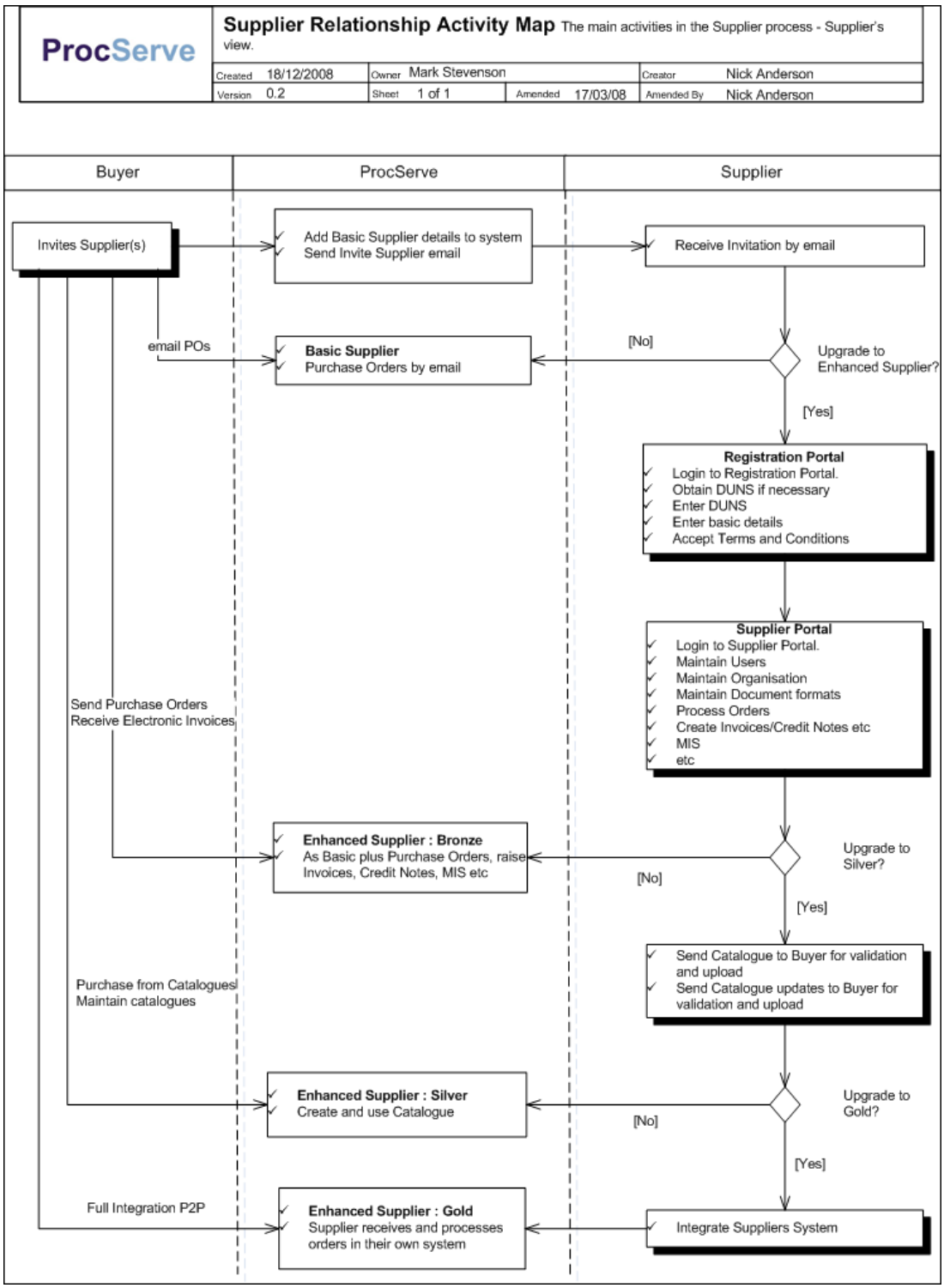
## 5.2 About Procserve Suppliers and Buyers

This provides and overview of the supplier and buyer relationship.
You can view a map that describes how the Procserve Trading Network enables supplier and buyer activities.

The following image shows the activities for each type of Supplier:

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The following list describes each activity in the above diagram:

- **Buyer: Invite Supplier(s)**. Buyers invite suppliers to join the Procserve network. by providing basic details such as a contact name and email address. These basic details will be loaded into our system.

- **Supplier: Receive Invitation emails**. Three emails are sent to the Supplier:
  - A welcome email containing basic instructions and a link to the Registration Portal.
  - An email containing your User ID for the Registration Portal.
  - An email containing your Password for the Registration Portal.

- **Supplier : Registration Portal**. As a basic supplier you can only receive orders as PDF attachments to emails from your clients. You can continue receiving your orders by email or you can go to the Registration Portal and register as a bronze enhanced Supplier.

- **Bronze Suppliers**. An bronze supplier can receive orders from buyers through the Procserve Supplier Portal. Buyers will create requisitions that, when authorised are sent as orders to the supplier. Suppliers can receive orders and subject to validation and other checks can create invoices and credit notes automatically at the Supplier Portal. Suppliers can also access reports (MIS) about the documents and other work flow items.

- **Silver Suppliers**. Suppliers and buyers can work together to upload and make available catalogues that buyers can shop from and add items to requisitions. There is an initial phase of uploading, validating, configuring and releasing catalogues (including setting up authorisations). Once a catalogue is in use then updates can be made that are fully validated, checked and confirmed before being released. multi-buyer catalogues can be shared amongst several buying organisations and need to configured slightly differently.

- **Gold Suppliers**. Gold suppliers connect their back office systems directly to the Procserve Trading Network. This means they can process and respond to orders electronically in their own applications.

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## 5.3 Quick Tips

| | | |
|---|---|---|
| **BUYER PORTAL** | **Logging in to the portal** | • The password in case sensitive.<br>• Your account will be locked if you enter your password incorrectly 3 times |
| | **Supplier directory** | • You can click the email field to send an email to us if you have a local mail program installed, for example Outlook.<br>• Click the download as vCard link to download the supplier details as a vCard. When you click the link a prompt will appear. You can save the vCard to your computer and import it onto your mail program later. |
| | **Supplier management** | • The Top Targeted suppliers tab provides quick access to your most used Suppliers.<br>• Clicking the blue flag will add the Supplier to the Top Targeted suppliers list. From here you can ensure that you focus your supplier adoption strategy on the suppliers that are more important to your organisation. |

| | | |
|---|---|---|
| **CATALOGUE** | **Opening the BMECat file** | • Excel Macros. If you have got macros turned off in Excel and you cannot open this file you will have to turn them on:<br>Open Excel.<br>Go to **Tools (Menu bar) >> Options >> Security (Tab) >> Macro Security (Button)**.<br>Select **Medium** security.<br>Close Excel.<br>When you open the Procserve Catalogue Builder you will need to select enable macros from the prompt. |
| | **BMECat file loading** | • You need to use the BMECat file (.xml) and not the Excel (.xls) file to load the catalogue. |
| | **Removing catalogues** | • Catalogues cannot be deleted. If you want to remove the catalogue so its no longer viewable, use the Export Revoke functionality. |
| | **Exporting your catalogue profile (single and multibuyer catalogues)** | • It is advised that the export of catalogue updates is scheduled for out of business hours as this will prevent the catalogue from disappearing from a user's view. The time stated in the export profile determines the time updated catalogue is exported. This does not affect the initial catalogue as this is scheduled manually in the export schedule.<br>• When a catalogue is exported, its contents can only be found during Shopping using the UNSPSC tree structure until the search index. The search index is scheduled to run 23:00 daily. Once this is complete you can use the keyword search to find items. Therefore it is recommended automatic export is scheduled to run after hours but before 21:00 (just allow enough time for the export to run – depending on the size of the catalogue, the export time will vary).<br>• Use 24hr clock (14:00 instead of 2:00) when scheduling a catalogue export. A date CANNOT be entered in the export Profile of a catalogue. If you want to export a catalogue on a specific date then this must be entered in the export schedule.<br>• For catalogue updates Only: If a time is entered in the export Profile, the catalogue will export at the specified time automatically once it has been approved by the buyer.<br>• The export schedule is used for the initial catalogue export. The initial catalogue export should be run immediately. |
| | **Loading catalogue with images** | • If you are uploading images you should perform the image upload before the catalogue is exported.<br>• You can use jpeg, png and gif image formats.<br>• Each individual image needs to be a reasonable size (for example under 100kb). The catalogue system does not resize images. Images are displayed as thumbnails in the Marketplace therefore having large images will only take a while to load on the page.<br>• The image name and extension must match that in the PCB.<br>• All images must be zipped before they are uploaded. |

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| | | |
|---|---|---|
| | | • The Zip file when opened should only display a list of images and nothing else. If you open a Zip file and see another folder in this file, the images will not load. The catalogue system looks to extract the image files from the zip but will be unable to find them if they are hidden within a folder. |
| | **Catalogue with expiry dates** | • Items entered with a expiry date will automatically be removed from the system when they reach their expiry date.<br>• Suppliers should use offline reminders to ensure a revised catalogue is loaded in time. |
| | **Validation Profiles** | • The PCB will check for many errors, therefore it may not be necessary to set a validation rule to Error.<br>• Choose the 'Error' evaluation wisely!<br>• It may be useful to standardise validation rules across your catalogues or certain commodities.<br>• Changing a Validation Rule will apply across all catalogues and therefore should not be amended. If you require a specific rule, create a new rule. |
| | **Process Profiles** | • Process profiles cannot be copied.<br>• For Multi Buyer Catalogues - amending the Process Profile will affect all buying organisations. |

| | | |
|---|---|---|
| **SHOPPING** | **Basket** | • Unless you cancel the purchase or checkout, your basket and its items will be cached. So the next time you log in to the Marketplace, your items will still be in your basket. |
| | **Comparing items** | • You can keep adding items to the comparison list until you are ready to compare. So you can switch between the compare items list and the window you were shopping in. |
| | **RFQ** | • In the RFQ overview page if the ppen RFQs list is empty you can click the create a new RFQ link to display the wizard.<br>• When the ppen RFQs list is empty the create a new RFQ link is displayed. You can click this link to start the create new RFQ wizard. |
| | **Searching** | • When a catalogue is exported, its contents can only be found during Shopping using the UNSPSC Tree Structure until the Search Index has run. The search index runs daily at 23:00. Once this is complete you can use the keyword search to find items.<br>• If you know the manufacturer's number, use this as a starting point.<br>• Try to be more specific when putting in search terms (if you want to look for A4 paper then do not search for paper as this term is too wide).<br>• If you have a catalogue number then use this as a search term.<br>• If you want to search for a product from a particular supplier then use the advanced search functionality.<br>• If you see a result that looks as if it shouldn't have been returned, look at the item in detail as the search term will be in one of the other fields.<br>• Use the slider bar to vary the way the system searches across the searchable fields.<br>• If you have a word that is made of two separate words (e.g. earplugs) break it down into individual words (e.g. ear plugs).<br>• Searched words can appear in any order within any of the searchable fields.<br>• If you know a product in a particular way (e.g. packing tape) and you get no results when searching, try searching for variations (e.g. parcel tape).<br>• If you have problems finding supplier catalogues or products and have exhausted all other tips and hints, please call or email the Procserve service desk.<br>• Do not try to search for words such as *a, an, and, are, as, at, be, but, by, for, if, in, into, is, it, no, not, of, on, or, such, that, their, the, then, there, these, they, this, to, was, will, with* etc. as they will be excluded from the search.<br>• If you need further help or guidance, please use the online help |

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| | | |
|---|---|---|
| | | function. |

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## 5.4 Troubleshooting

| | |
|---|---|
| **I cannot find a supplier in the supplier directory** | Try changing search term as the organisation may have registered their full name or with a different abbreviation. |
| | Try searching by the supplier's DUNS. |
| | Contact the supplier to confirm their details. |
| **I don't understand why I am getting some results in my supplier directory search** | The search does not only run on the supplier name other information the supplier provides such as whether they provide recycled goods is also searched against. |
| **I cannot delete a user** | You will not be able to delete users due to audit requirements however you should disable any user accounts that are no longer required. |
| **I cannot see the private catalogues that I am loading in my classification view** | Confirm that the catalogue was imported against your organisation by checking the header in the catalogue builder matches exactly the organisation in the portal. |
| | Confirm that the catalogue management system export was successful. |
| | Contact Procserve helpdesk to ensure the correct assigned buyer has been set. |
| **My shopping cart has contents in it that I didn't add** | Some organisations will have requested to have shopping carts saved if the user closes the session without checking out therefore if you did this last time that will be why items are in the cart. |
| **I cannot find the same products as my colleague** | The solution supports what are known as classification views which control what content can be seen by different users which would explain why you cant see what someone else can if you have different views assigned. |
| **I have loaded a catalogue and have assigned to a classification view but my users cannot see the items within the marketplace** | The item will be searchable using the UNSPSC structure, however you will need to wait for the search index to run for your users to find the item using the standard search feature. |

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| | |
|---|---|
| **How can I find a item which has a " / " in the description?** | If you are searching for an item with a " / " eg 26/6 Staples, the / is ignored by the search engine. This means that when you search for "26/6 staples" the search engine searches for "26 6 staples", which means that 26/6 staples are not found. To overcome this, use the search term "26?6 staples" as the ? denotes any one character. |
| **I wish to add additional buyers to an existing catalogue** | **Symptoms**: If you have asked the Service Desk to add additional buyers to a multi-buyer catalogue that has already reached 'Update Expected' the Catalogue may go to "Supplier Review - Please solve all errors!" and all the items marked will be marked as 'Errors'.<br>**Cause**: This is an expected system state as the Catalogue will be waiting for a price file for the new buyer.<br>**Resolution**: Load a price file for the new buyer and click 'Validate' to clear the errors. This will move the task onto "Release the Catalogue" and continue following the process in the normal way until its reached "Update Expected" again. |

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## 5.5 Glossary

The glossary provides a list of terms and definitions used in the system.

| Term | Description |
|---|---|
| AID (Re Procserve catalogue Search) | Article ID. The item number. |
| Approval Plan (re P2P) | A list of business rules defining what happens to either a requisition or purchase order after it is submitted by a user. Approval Plans contain approval criteria and notification controls. |
| Assortment catalogue (re Procserve Catalogue Manager) | (See also Buyer Catalogue). A Catalogue created from a Multiple Buyer (or source) Catalogue for a single Buyer. The Catalogue may contain all or any assortment of items derived from the Multiple Buyer Catalogue and may be enhanced with Buyer specific data. When the contents of an Assortment Catalogue is defined, the item data is not copied but referenced to the original source Catalogue. |
| Audit Trail (re P2P) | A list of all actions that occur during the processing of a requisition or purchase order that Procserve Purchase to Pay records and automatically time and date stamps, which is visible to all the parties who have permission to view the order. |
| BASDA | Business Application Software Developers Association. |
| BME (Re Procserve Catalogue Builder & Procserve Catalogue Manager) | The Bundesverband Materialwirtschaft, Einkauf und Logistik . (The Federal Association for Material Management, Purchasing and Logistics, based in Frankfurt Germany.) |
| BMEcat | BMEcat data format is a widely used international standard for the exchange of product data catalogues between Supplier and purchasing Organisations. This standard is used by the Procserve Trading Network for the creation and exchange of Catalogue data within the Procserve Catalogue Builder, Procserve Catalogue Manager and Procserve Catalogue Search. {Web: http://bmecat.de} |
| Browser | The user interface to the Procserve Trading Network is through your standard Web browser (example Microsoft Internet Explorer or Netscape Navigator). |

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| Term | Description |
|---|---|
| Buyer Catalogue (Re Procserve Catalogue Manager) | (See also Assortment Catalogue). A Catalogue created from a Multiple Buyer (or source) Catalogue for a single Buyer. The Catalogue may contain all or any assortment of items derived from the Multiple Buyer Catalogue and may be enhanced with Buyer specific data. When the contents of a Buyer Catalogue is defined, the item data is not copied but referenced to the original Source Catalogue. |
| Catalogue Context (Re Procserve Catalogue Manager) | The selection of a Catalogue with which it is intended to work. |
| Catalogue Edition (Re Procserve Catalogue Manager) | Editions are used so that the history of a Catalogue can be managed coherently. A Catalogue always has one current edition, in which changes, validations and other operations are made and is identified with a name and description. There can be multiple versions of each edition. |
| Catalogue Status (Re Procserve Catalogue Manager) | Provides information about the process steps that are currently being carried out within the Catalogue. |
| Catalogue Version (Re Procserve Catalogue Manager) | Several versions can exist of one Catalogue edition. The version number is incremented from within the Catalogue edition and is usually used to record a major revision to the data. Catalogue Versions can be created manually and are also created automatically before each import. |
| Check Data (re Procserve Catalogue Builder) | The process of running macros to test and validate Catalogue data in the Procserve Catalogue Builder before the creation of the BMEcat file. |
| Class Code | The product classification code associated to an item. It is mandatory in Procserve Trading Network catalogues that all items are coded to the UNSPSC. |
| Cookie | A cookie is a small piece of data which is sent from a website to a web browser and stored locally on a users PC. The use of cookies enables a Web site to become more interactive with its users. The Procserve Trading Network uses session cookies to ensure that a user is recognised when they move from page to page within the Marketplace and that any information entered is remembered. Unlike normal cookies, session cookies are deleted from the users PC when they log out. |
| CPV | Common Procurement Vocabulary. A product classification system derived from the UN Common Procurement Classification and adopted as an EU standard. Used for public procurement and public sector reporting and used to drive OJEU Notices. {Web: http://www.simap.eu.int} |

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| Term | Description |
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| CSV | Comma Separated Value. A flat file format sometimes used for data import or export. |
| cXML | Commerce eXtensible Mark-up Language. (see also XML). A standard, defining acceptable formats and content, for sending documents by electronic means. |
| Data Key | The individual or combined elements or properties of data that are used to determine the uniqueness of a Catalogue item. |
| DUNS Numbers | Dun and Bradstreet Number. DUNS numbers (or correctly D-U-N-S Numbers) are issued, owned and solely maintained by Dun & Bradstreet Corporation and are used in the main for credit risk management and corporate authentication. The DUNS Number is a unique nine-digit identification sequence, which provides unique identifiers of single business entities, while linking corporate family structures together. When a business is entered into the D&B business information database each distinct business location that it has, is assigned its own DUNS Number. |
| EAN | European Article Numbering. Widely used bar code symbology used for product marking. Two versions of EAN exist. (See also UPC.) The EAN system is managed worldwide by EAN International {Web: http://www.ean-int.org} |
| eBis | Electronic Business Interchange Standard (see XML). A standard, defining acceptable formats and content, for sending documents by electronic means. |
| EBP | SAP Enterprise Buyer Professional. A procurement application which can be integrated for use as the P2P system within the Procserve Trading Network. |
| eClass | A product classification system that has been developed to enable products, materials, merchandise and services to be organised in a logical structure. The system has four hierarchical levels. The highest level consists of 22 technical domains, which are divided into main groups, groups, and subgroups as leaf product classes. Each level is identified by a two-digit number, so that each subgroup can be identified by its eight-digit class number. |
| eForm | A document held electronically. |

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| Term | Description |
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| ERP | Enterprise Resource Planning systems. (Example: Oracle, JD Edwards, SAP, or Peoplesoft) An industry term for the broad set of activities supported by multi-module application software that helps a manufacturer or other businesses manage the important parts of their business, including product planning, parts purchasing, maintaining inventories, interacting with Suppliers, providing customer service, and tracking orders. ERP can also include application modules for the finance and human resources aspects of a business. Typically, an ERP system uses or is integrated with a relational database system. The Procserve Trading Network can integrate information into these systems. |
| ERS | Evaluated Receipt. |
| ETIM | Electrotechnical Information Model. A classification scheme for the electrical and electronics industry. |
| EUR | Euro (currency). |
| Explicit Item List (Re Procserve Catalogue Manager) | An explicit item list is a list of items that is specifically included in or excluded from an assortment Catalogue. |
| FMS | Financial Management System. |
| FTR | Free Text Requisition. |
| Free Text Items | (see also Non-Catalogue Items). Goods or services added to a requisition which are not included in a Catalogue. |
| GBP | Great British Pounds (currency). |
| GPC | Government Procurement Card. |
| GTIN | Global Trade Identification Number. Generic term representing a family of global data structures including EAN, UCC and UPC. |
| Key | A database identification field not usually used in the GUI that uniquely identifies a data element. |
| LAN | Local Area Network. Usually your computer is attached to other computers and severs that reside internally within your Organisation. This is your organisation's LAN. |
| Lock(ed) Out | The inability of a user to login to the Procserve Trading Network due to the freezing of their user account. A lockout occurs after 3 failed login attempts. |

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| Term | Description |
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| Mass Edit (Re Procserve Catalogue Manager) | The process of editing multiple items in a single operation. |
| Merchant Capacity | The Merchant Capacity indicates what level of VAT detail on purchases the merchant is able to provide to the buying Organisation. It should only be selected where Payments Accepted = Credit Card. The Merchant Capacity levels are 0 = does not accept credit cards; 1 = provides basic VAT information; 2 = provides Summary VAT information; 3 = provide Line Item Detail. In order to receive either Level 2 or Level 3 VAT information the buying Organisation must use a Purchase Card; Purchase Cards are only available to public sector Organisations. |
| MRO | Maintenance, Repair, and Operations. Products and services that Organisations must obtain to run their day-to-day business operations. |
| Multiple Buyer Catalogue (re Procserve Catalogue Manager) | (See also Source Catalogue). A Catalogue created for the purpose of having more than one buying Organisation associated with it and contains data for more than one Buyer. Used to create Assortment Catalogues. Multiple Buyer Catalogues are not exported to Procserve Catalogue Search. |
| Non-Catalogue Items | (see also Free Text Items). Goods or services added to a requisition that are not included in a Catalogue. |
| NSV | National Supplies Vocabulary. Product classification code originally developed by the NHS and used as a standard in UK government. Managed by Coding International {Web: http://codingit.co.uk} |
| OCI | Open Catalogue Interface. Used by SAP EBP applications to communicate with external Catalogue systems (eg Procserve Catalogue Search). |
| OGC | Office of Government Commerce. The Office of Government Commerce is an independent office of the Treasury and works with public sector Organisations to help them improve their efficiency, gain better value for money from their commercial activities and deliver improved success from programmes and projects. {Web: http://www.ogc.gov.uk} |
| Buying Solutions | Buying Solutions is the trading arm of the Office of Government Commerce, which is itself an office of HM Treasury. It provides public sector procurement professionals with a route to the products and services they need to maximise procurement efficiency and value for money. Its contracts and framework agreements offer substantial savings through significant buying power, economies of scale |

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| Term | Description |
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| | and strategic partnerships.<br><br>Rigorous tendering and evaluation processes ensure that products and services are checked for quality, price competitiveness, fitness for purpose and compliance with statutory requirements. These products and services are available through Buying Solutions framework agreements, managed services and other procurement arrangements.<br><br>More details are available on the website: http://online.ogcbuyingsolutions.gov.uk |
| OJEU | Official Journal of the European Union. |
| OPEN | Online Procurement for Education Needs. An eProcurement Marketplace solution designed specifically for schools. |
| P2P | Purchase to Pay or Procure to Pay. The procurement application used to connect to Procserve Catalogue Search. The P2P used within the Procserve Trading Network environment is Procserve P2P. |
| PA Consulting | PA Consulting. PA Consulting Group is a leading management, systems and technology consulting firm. {Web: http://www.paconsulting.com} |
| Parametric Search | A method of searching catalogues that enables the user to define values for certain Catalogue fields. Procserve Catalogue Search returns a list of items that match the search criteria. |
| PDF | Adobe Portable Document Format. A format that allows the conversion of virtually any document in virtually any application to be universally distributed read and stored. |
| Private Catalogue | Where a Supplier provides a Catalogue to a single buying Organisation under contract or agreement with that buying Organisation. |
| Process Profile (Re Procserve Catalogue Manager) | The entire management process from import to release of data. Standard processes distribute tasks to responsible users and can automatically start operations like Catalogue exports. |
| Procurement Cards | In some buying Organisations, credit or charge cards which are used for purchasing supplies. (Also known as Purchasing Cards or GPC's) |

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| Term | Description |
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| Procserve Catalogue Builder (PCB) | The PCB is a Microsoft Excel spreadsheet used to contain data that defines catalogues and Catalogue item data. A macro (Check Data) can be run to check that the data is correctly formed. Once data has been checked a BMECat file (q.v.) can be generated. The BMECat file can then be imported onto the Catalogue Management system. |
| Public Catalogue | Where a Supplier provides a Catalogue for use by multiple buying Organisations under contract or agreement with Buying Solutions |
| Recurring Requisition | (see also Shopping Lists). A saved list of regularly purchased items. A recurring requisition can be used to add items to a requisition instead of searching catalogues. |
| Requisition (re P2P) | Request for purchase, which may consist of items from various Suppliers, grouped and ready to submit for approval or ordering. A requisition is usually converted into a Purchase Order, during or after approval. |
| RFQ | Request for Quote. |
| RMA | Return Material Authorisation. The generic term for a returns number issued by a Supplier under which goods are to be returned. |
| SAID (Re Procserve Catalogue Search) | Supplier Article ID |
| Scrolling | If a list or page contents extends to. over a single page display, it is possible to scroll vertically or horizontally to read the hidden page content. |
| Search Engine | A tool which enables a user to search for items or documents based on information that they enter. A search engine returns a list of results which meet the search criteria. |
| SGML | Standard Generalised Mark-up Language. |
| Shopping Basket | The term used in Procserve Catalogue Search to refer to a list of items that an individual is buying and wishes to return to their P2P application. The Basket is sometimes referred to as a “Cart”. In the P2P application a Shopping Cart is usually converted into, or added to a Requisition. |
| Shopping List | A saved list of items for adding to a Shopping List in Procserve Catalogue Search. Shopping Lists can be used as templates or skeleton orders to avoid the need for searching catalogues. |

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| Term | Description |
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| Source Catalogue (re Procserve Catalogue Manager) | (See also Multiple Buyer Catalogue). A Catalogue created for the purpose of having more than one buying Organisation associated with it and contains data for more than one Buyer. Used to create Assortment Catalogues. Source Catalogues are not exported to Procserve Catalogue Search. |
| Source File | The relative path and name or URL of a file. |
| SQL | Structured Query Language. A language used to obtain data from or modify data in a relational database. |
| SSO | Single Sign On. |
| Standard Supplier Catalogue (re Procserve Catalogue Manager) | A Catalogue provided by a single Supplier which is associated with exactly one buying Organisation. A Standard Catalogue is exported to Procserve Catalogue Search. |
| Target System (Re Procserve Catalogue Manager) | The directory to which an exported Catalogue file is to be copied. |
| Thumbnail | A small preview of an image. |
| UCC | Uniform Code Council. (Also known as GS1US) The Organisation appointed by the UNDP as the code manager responsible for managing the UNSPSC Classification scheme. The code manager is responsible for ensuring compliance with the principles of the UNSPSC as well as the integrity of the code schema. The UCC is responsible for overseeing code change requests, industry revision projects, issuing regularly scheduled updates to the Code, communications with members, as well as special projects and initiatives as determined both by the UNDP and member requests {Web: http://www.gs1us.org and http://www.uc-council.org}. |
| UNDP | United Nations Development Program. The UNDP own all rights to the UNSPSC and appointed the Uniform Code Council (UCC) as code manager (Web: http://www.undp.org). |
| UNECE | United Nations Economic Commission for Europe. |
| UNECE Recommendation 20 | The unit of purchase used in the Procserve Trading Network. {Web: http://www.unece.org} |

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| Term | Description |
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| UNSPSC | United Nations Standard Products and Services Code. An international standard product classification code structure developed jointly by the UNDP and D&B. Preferred classification code of the OGC and the mandatory classification system for the Procserve Trading Network. (Web: http://www.unspsc.org). |
| UOM | Unit of Measure. Referred to in the Procserve Trading Network as the Unit of Purchase. (See also UNECE Recommendation 20) |
| UPC | Universal Product Code. Widely used bar code symbology developed originally by the grocery industry, used for product marking. Five versions of UPC exist. (See also EAN.) An online database for UPC codes exists at: http:// www.upcdatabase.com. |
| URL | Uniform resource Locator. An internet address. |
| USD | United States Dollar (Currency). |
| Validation Rule (Re Procserve Catalogue Manager) | A specific validation test for testing the quality of data. Validation Rules are grouped together to form Validation Profiles which can be associated with a Catalogue or Organisation. |
| VAT | Value Added Tax. |
| XML | Extensible Mark-up Language (see also cXML). A type of web page that allows large amounts of data to be shipped across the internet in a compact format while retaining the information in distinct fields, that can be used for integration with a database. |
| Zanzibar Managed Service | The Zanzibar Managed Service is the UK public sector eProcurement managed service delivered by Procserve. It is available under a framework agreement to all English, Wales and Northern Irish public sector Organisations. Zanzibar is a web-based purchase to pay (P2P) and electronic Marketplace solution, It provides a common hosted platform for ePurchasing and eInvoicing. |
| Procserve Catalogue Manager | The Procserve Trading Network Catalogue Content Management System. The application into which the BMEcat file is imported for the creation, management and approval of Supplier catalogues. Catalogues are exported from Procserve Catalogue Manager to Procserve Catalogue Search. |
| Procserve Catalogue Search | Procserve Trading Network catalogue system. The application into which catalogues are imported from Procserve Catalogue Manager, where they are hosted for |

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| Term | Description |
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| | P2P and ERP systems to access. |
| ZIP File | A file that has been compressed for ease of transmission. |
| ZMP Forum | Zanzibar Marketplace Forum. |

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